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Monday, May 19, 1986

Advertising Age

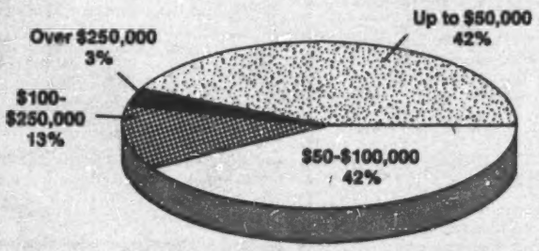
Crain's International Newspaper of Marketing. In Two Sections, Section 1.

Agency compensation

Table 1

1985 total cash compensation
1,654 top executives—all ad agencies

($73,600 average total compensation)



Source: © copyright 1986 by Cole Surveys, Inc.

Agencies surveyed

Salary sweet, but bonus bountiful

The first of a planned annual study of compensation among advertising agency executives confirms that superstars can earn big bucks. But the average salary-plus-bonus for the 1,654 executives who participated was a more down-to-earth $76,000.

Among the highlights of the study, conducted by Cole Surveys in cooperation with Advertising Age:

- Fifty-two of the 1,654 top executives (3%) received total pay of more than $250,000 (1985 salary plus bonus). The highest total cash reported was $890,200. Two others got more than $800,000; two received between $500,000 and $600,000, eight were between $400,000 and $500,000. (See Table 1.)
- Of the 1,654 participants, 221 (13%) got between $100,000 and $250,000; 685 (42%) received between $50,000 and $100,000, and 696 (42%) earned up to $50,000.
- The average total cash compensation for the year of all ad executives in the sample was $73,600.
- Cash bonuses added a substantial amount to the base salaries of hundreds of executives. The bonus received (in most cases paid in early 1985 for performance in 1984) was calculated as a per cent of the October, 1985, base salary.
- 667 of the 1,654 (40.9%) received a cash bonus during the calendar year. Those who got one averaged 21.7% of their base salary—or $16,500. The bonuses of 18 (1%) exceeded $500,000.
- Six of every 10 (61.5%) of the top brass—ceos, presidents, branch office managers and exec vps—got a bonus that averaged 32.2% of their base salary.
- Of the 10 highest-paid ceos—total pay ranging from $310,000 to $890,200, all in self-standing companies or conglomerates—eight received a cash bonus; two didn't. The eight bonuses totaled $983,000, 14.9% of the total of the eight ceo base salaries—$6,600,900.
- One ceo whose company billings were not even in the largest billing-size group hit the jackpot. His bonus came to 230% of base salary —$315,500 on a salary of $132,000—for total earnings of $447,500. From 10th place among (independent) ceos in base-salary rankings, he rose to the sixth spot in total cash on the wings of that bonus.
- Creative directors were not far behind the averages of the ceos: 41 of 68 (60.3%) got bonuses equaling 26.3% of base salary. But in the larger billing-size groups, creative heads were on a par with the bonus levels of other top-management officers. For example, in

(Continued on Page 32)

Merger aftershocks main topic at Four A's

By STEWART ALTER

WHITE SULPHUR SPRINGS, W. VA.—Even the treasurer's report at the American Assn. of Advertising Agencies' annual meeting here couldn't ignore the impact of the last three weeks of megamergers that are transforming the agency business.

As part of his report on the Four A's finances, treasurer Ron Stone, chairman of Stone, August & Co., Birmingham, Mich., claimed he had devised a way to net $1.8 billion, flashing a slide on the screen that read, "Saatchi & Saatchi—AAAA," explaining, "We sold the Four A's to the Saatchi brothers."

More Four A's coverage on Pages 112, 113 and 114.

The reference to Maurice and Charles Saatchi, who in recent weeks have electrified the industry with their buys of Backer & Spielvogel ($100 million) and Ted Bates Worldwide ($450 million-plus), was only one sign of how these acquisitions, plus last month's BBDO/Doyle Dane Bernbach/-Needham Harper Worldwide megamerger, are now dominating the thoughts of agency executives.

For certainly, as most realize, this merger activity is breaking new and potentially risky ground. Paraphrasing Richard Deupree, one of the earlier builders of Procter & Gamble, Maurice Saatchi told ADVERTISING AGE last week in an interview from London, "We have climbed to the top of a slippery pole and we can only stay there by being the best."

Photo by Mary Hinkley

After announcing his agency's merger with Saatchi & Saatchi last week, Ted Bates Worldwide chairman Robert Jacoby (r.) hurried down to the Greenbrier to be installed as new chairman of the American Assn. of Advertising Agencies. With him here are outgoing Four A's chairman Lou Hagopian (l.), chairman of N W Ayer, and Four A's president Len Matthews.

Gathered at the Greenbrier here for the Four A's 68th annual meeting, the members made it apparent that if there was one thing that stood out—more in the corridor talk than in the formal presentations—it was that the subject of mergers had come out of the closet.

Mixed in with the serious conjecture about how clients were reacting to this rapid consolidation of the business, and the conflict questions it poses, were clear indications of how acceptable the topic of merger had become and how prepared for it the industry has become.

There were jokes and endless rumors about who was next. A top-level J. Walter Thompson Co. executive, for example, would greet colleagues by asking them lightheartedly whether they had heard the latest—and dominant—rumor at the conference, that JWT Group and Ogilvy Group were exploring merger—a coupling being denied by both agencies.

Still, the Four A's annual gathering is a place where agency executives could stage secret rendez-

(Continued on Page 112)

Last Minute News

Triangle gobbles up 'Great Foods'

NEW YORK—*Good Food*, Triangle Communications' troubled food monthly, is acquiring the approximately 600,000 subscription sales of every-other-monthly *Great Foods* from GF Magazine Inc., Englewood Cliffs, N.J. *Great Foods* will cease publication. The move is effective with the July issue of *Good Food*, which since its February debut has been selling about 400,000 to 500,000 copies, as much as 47% below its 750,000 rate base, and selling fewer ad pages than anticipated. Triangle says *Good Food*'s circulation will now top 900,000; ad rates will remain unchanged at $9,375 for a b&w page and $11,250 for a color page.

Apple expected to pick between Chiat, BBDO

CUPERTINO, CAL.—Apple Computer is expected to choose between incumbent Chiat/Day, Los Angeles, and BBDO, New York and San Francisco, for its $50 million U.S. account in a closed door meeting May 19 among Apple president John Sculley and three top aides. Sources see BBDO as the front-runner, but suggested Apple may retain Chiat for the Apple II line. Apple had no comment.

Ads stress that U.K. is O.K. for tourists

NEW YORK—British Airways on May 23 will break an estimated $6 million campaign supporting new in-flight amenities and service improvements designed to stimulate U.S. tourists to take summer vacations abroad. BA will offer extras including free champagne and caviar on trans-Atlantic flights from its 15 U.S. markets. Saatchi & Saatchi Compton

(Continued on Page 8)

First comes the boom, then gloom

By WILLIAM F. GLOEDE

NEW YORK—The rash of megamergers that put Wall Street and the Saatchis in control of Madison Avenue is starting to take a psychological toll on the agency community here.

An even larger effect is expected later, when the megamergers are consummated and the consolidation of agency resources and client-conflict fallout begin to affect more jobs.

"I have seen more demoralized people, more surprised people, a lot of depressed people, a lot of angry people," said Bonnie Lunt, presi-

(Continued on Page 110)

CBS warms to advertiser-produced programs—P. 3

NEWSPAPER

HIGHLIGHTS

Survey: Stars earn big bucks 1
The first of a planned annual study of compensation among advertising agency executives, by Cole Surveys in cooperation with Advertising Age, confirms superstars can earn big bucks. But the average salary-plus-bonus for 1,654 executives queried was a more down-to-earth $76,000.

Mergers tough for some 1
The rash of megamergers that put Wall Street and the Saatchis in control of Madison Avenue is starting to take a psychological toll on the agency community. An even larger effect is expected later, when the megamergers are consummated and the consolidation of agency resources and client-conflict fallout begins to affect more jobs.

Hardee's, 7-Eleven link 3
Hardee's Food Systems will begin licensing products to Southland Corp.'s 7-Eleven chain this summer in the fast-food industry's first major move into convenience stores.

Y&R flags down TWA 3
Young & Rubicam last week landed Trans World Airlines' $50 million-plus account with a pragmatic campaign themed "Today's TWA—Find out how good we really are," which won over the airline's demanding chairman, Carl Icahn.

Kodak to try batteries 3
Eastman Kodak Co. is expected to disclose May 22 that it will make an assault on the booming $2.3 billion battery market with a line of Kodak batteries.

First-quarter results slow 4
Except for J. Walter Thompson USA's strong showing of 12% revenue growth, public agencies' first quarter was what analyst Charles Crane termed "ho-hum." U.S. revenue growth for these agencies was in the 5½%-to-6% range, noted Mr. Crane. He called JWT's 12% boost "spectacular" by comparison.

Metro gets tough 6
Metropolitan Sunday Newspapers is firing the first salvo in what some agency media executives say could become an all-out war among Sunday newspaper magazines. Metro, which represents locally edited Sunday magazines that make up the Sunday Magazine Network, is trying to position itself as the upscale alternative to *USA Weekend* and *Parade*.

Thrills fill tills 24
The $2 billion U.S. theme park industry this year is counting on increased domestic tourism, lower gas prices and new marketing programs to draw a record 200 million visitors. Roller-coaster swings in attendance during the last few years have made prospects for strong summer sales even more welcome.

P&G's Always earns a place 78
When Procter & Gamble introduced its Always feminine hygiene line, industry analysts predicted the $1 billion category could not support another major entry. Now, two years after P&G's $100 million introductory campaign, it appears the industry can support all four major players—but at a price.

FEATURES

Newton works out the kinks 46
Helmut Newton has no patience with amateur realists, but there have been signs of softening—at least around the legendary photographer's hard-core edge. "I don't deserve to be called 'King of Kink.' I haven't done anything kinky for a long time," Mr. Newton, 66, says.

Packaging that rocks 50
From car stereos to computers, from software to satellite dishes, the Canadian marketplace is saturated with high-tech merchandise. Moving the goods demands promotion and design skills more in tune with the world of rock music than with mainstream advertising—or so says Peter Francey, president of the Spencer/Francey Group, one of Canada's hottest design companies.

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Candy is dandy 22
The nation's $7 billion candy industry is moving upscale, with new higher-price products and ad campaigns targeting sweet-toothed adults. With baby-boom adults now fueling much of the candy industry's record-breaking growth, most major marketers have added mass-marketed adult items to their traditional line of chocolates.

INTERNATIONAL

Chernobyl fallout continues 70
Last month's Chernobyl nuclear power plant accident and its fallout across Western Europe have made consumers more cautious and increased demand for "safe" products, such as iodine tablets, canned and frozen food items and bottled water.

Getting a kick from soccer 71
The World Soccer Cup games kick off in Mexico City May 31 and an estimated cumulative audience of 12 billion worldwide will watch them on tv. An average of 230 million viewers will watch each of the tournament's 52 contests.

OTHER NEWS

CBS-TV will open its schedule to even more advertiser-produced programing, Broadcast Group president Gene Jankowski said last week. Page 3.

Foote, Cone & Belding Communications chairman-ceo Norman Brown said last week he feels "no pressure" to seek a merger partner, and he assured shareholders that FCB has the strength and size to compete. Page 4.

Quaker Oats Co. is looking to pump a little life into its Life brand ready-to-eat cereal with a $2 million promotion aimed at making children into commercial directors. Page 26.

The code name YJ on the new Jeep Wrangler doesn't stand for "Yuppie Jeep." But the Wrangler is aimed at a target audience more educated, more urban, more white-collar and more affluent than buyers of the venerable CJ. Page 82.

The price of gold is shrinking, and so is the size of the gold coin account that the U.S. Treasury Department is about to toss up for agency grabs. Page 86.

The first campaign for Frontier Airlines from its new shop, Bloom Agency, is set to break May 23 with advance billing from the airline that it will have "a totally new and different look for [airline] print advertising." Page 87.

The low-fare ad battle among airlines serving Denver has triggered a crackdown by the Colorado attorney general, who has grounded the catch-all phrase "some restrictions may apply." Page 87.

3M Co. moved to spoil Winthrop Consumer Products' $3 million introduction of pHisoPUFF Disposa-Puffs last week by kicking off a promotion for its Buf Puf brand the day before. Page 101.

Procter & Gamble has reassigned several executives in its soap and detergent division, moves viewed as significant to the company's hierarchy. Page 101.

SPECIAL REPORT

The nation's top 44 marketing/advertising/public opinion research companies reported 1985 worldwide revenues of $1.65 billion. Special Report profiles these 44 companies in its annual research

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French agency sought by BBDO

By CLAIRE WILSON

Paris—On the heels of its historic grouping with Needham Harper Worldwide and Doyle Dane Bernbach, BBDO is trying to buy a piece of Belier, a leading French agency partially owned by Havas.

Havas, which was put up for sale last month, is 50.25% government-owned and has extensive holdings in the advertising, tourism, radio and tv industries, including a minority share in Canal Plus, the pay-tv channel introduced last year (AA, April 28). Advertising agencies account for 25.2% of Havas' revenues.

"Even prior to the merger agreement, we had been talking on and off to a number of French agen-

(Continued on Page 114)

Iacocca rips Ford quality ads

By JESSE SNYDER

Chrysler Corp. chairman Lee Iacocca is taking another run at his ex-boss, making Ford sweat the details of its ad claim to have America's "best-built" cars and trucks.

Mr. Iacocca, claiming Chrysler's own survey of 1986 domestic vehicle buyers shows it first ahead of General Motors Corp. and Ford, wants Ford to drop its claim. He threatened to ask the Federal Trade Commission or tv network review committees to force Ford commercials off the air.

Ford, which has made the claim since August, 1983, said it "stands by our advertising claims on quality." Ford up-

(Continued on Page 114)

West Coast news

Cochrane to earn a Dollar

Dollar Rent-A-Car Systems, Los Angeles, appointed Cochrane Chase, Livingston & Co., Newport Beach, Cal., to handle its $3 million-to-$5 million account, formerly at Liebowitz, Olshever, Vogel & Baruch, Los Angeles, which folded. CCL beat out Keye/Donna/Pearlstein, Los Angeles. Abert, Newhoff & Burr, also Los Angeles, opted out of the review. The rental-car company hasn't yet named a replacement for vp-marketing John Anderson,

(Continued on Page 114)

First quarter winds up on 'ho-hum' note

By STEWART ALTER

Except for J. Walter Thompson USA's strong showing of 12% revenue growth, public agencies' first quarter was what analyst Charles Crane termed "ho-hum."

U.S. revenue growth for these agencies was in the 5½%-to-6% range, noted Mr. Crane, an analyst at Oppenheimer & Co., New York. He called JWT's 12% boost "spectacular" by comparison.

But parent company JWT Group's profit margins are "still disappointing," said Mr. Crane.

Agencies as a group seem to have increased expenses, he said.

Because the first quarter accounts for the smallest amount of ad agency revenues and profits, it tends not to be viewed as an indicator of what the full year holds.

But Mr. Crane observed that "it does give us our first glimpse of the cost structure for the balance of the year." In that case, he said, the generally lower first-quarter margins appear to indicate two things: Agencies have been staffing up "at the end of 1985 in anticipation of a better year in 1986," and they are giving out the wage and salary increases they held back last year.

Philip Geier Jr., chairman-ceo of the Interpublic Group of Cos., whose agency group gained $123 million in net new income in the quarter, noted the quarter's results are not necessarily indicative of the results for the full year.

Norman Brown, chairman-ceo at Foote, Cone & Belding Communications, observed: "We are pleased with FCB's first-quarter results, even acknowledging that in the advertising industry first quarters are not necessarily a good indicator of results for the full year."

Some are taking the first-quarter results as a less than hopeful sign. Grey Advertising's results "reflect. . .the fact that over-all advertising volume appears to be growing at a less than robust rate," said chairman-ceo Edward Meyer.

Ogilvy Group chairman-ceo William Phillips also noted, in looking at the first quarter, that "it appears that 1986 will be a tight year in the U.S., with very low inflation and softness in the media markets. We are paying close attention to costs to maintain our profit expectations for the year."

Mr. Phillips previously had expressed concern about the impact of disinflation on agency results when he released Ogilvy's strong yearend figures.

With Ogilvy Group's first-quarter net income actually down 9.2% to $3.2 million, Mr. Crane noted that those previous remarks apparently were "a warning sign."

From Mr. Crane's conversations with the agencies and with advertisers about ad spending forecasts, he said he is "getting the sense that the second quarter would not be that much different but that there would be a pickup on a percentage comparison basis in the second half of the year."

Agency financial results

First quarter revenue and income showed improvements over the year-ago quarter, but analysts noted profit margins were generally lower. The agencies differ about the significance of the results for the rest of 1986. Source: Advertising Age.

Agency	Income ($000) 1985	1986	(%)	Revenues ($000) 1985	1986	(%)
First quarter						
Ally	400	696	+64	8,307	8,301	-0.4
BBDO	4,219	4,870	+15	75,819	81,807	+8
DDB	1,108	1,574	+42	51,190	54,765	+7
FCB	1,220	2,218	+82	83,970	89,891	+9
Grey	1,464	1,315	-10	49,728	57,106	+15
Interpublic	3,777	4,335	+15	148,149	167,923	+13
JWT	209*	2,949	+1,309	125,993	147,744	+17
Lintas	711	177	-75	34,080	31,080	-13
Ogilvy	3,982	3,236	-9	103,903	120,938	+16

*JWT took write-off loss in first quarter of 1985 on the divestiture of its international advertising subsidiaries.

U.S. NewsWatch

Marketing news from regional centers across the country

PHILADELPHIA—**Howard Rice** becomes chairman of Kalish & Rice Advertising, replacing Allan Kalish, chairman and founder, who left to pursue other interests. Also: Michael Meyer becomes exec vp-general manager from senior vp, Della Femina, Travisano & Partners, New York, replacing Stephen Levine, who left.

BUFFALO—**Goldome FSB** begins test-marketing its Hills Financial Centers May 20 in four Toledo, O.-area Hills Department Stores. Newspaper ads, via Bolling Peterson, compare Goldome's CD rates to other bank rates.

NEW YORK—**Bergelt Litchfield Inc.** is the new agency formed by the merger of Bergelt Advertising/PR, a $10 million shop, and Litchfield Group, a $6 million shop. David Venghaus, former Litchfield president, becomes chairman-ceo of the new agency. John Fraioli, former Bergelt exec vp, becomes president-chief operating officer.

INDIANAPOLIS—**Southwestern Bell Freedom Phone**, a Southwestern Bell Telecommunications division, today breaks a national print

(Continued on Page 94)

WHO HELPED BACARDI INTO THE BLACK?

The same techniques that developed new Black Label Rum for Bacardi and new Glass Works for S.O.S, put Baking Soda in more than thirty million refrigerators, and created the new Magic Mushroom Air Freshener for Airwick...can work for you.

They could be just what you've been looking for to restage that fading star or create a successful new product's plan. Gerald Schoenfeld, Inc., consultants to America's major marketers, now offers the "Product Success Program."

- Whether it's developing new products from scratch or treating old products like new;
- Whether your resource is your name, your R&D, your distribution, your marketing insights, your established brand, your interest in a new category, or some combination of these;
- Whether you want us to work with your agency or without, here or abroad;

...the "Product Success Program" offers unique and proven techniques.

To find out more about the "Product Success Program," call or write Sonia Kallen (914) 631-8800. 55 South Broadway, Tarrytown, N.Y. 10591

Gerald Schoenfeld inc.
New Product/Marketing Consultants

But it's still seeking buyout prospects

FCB: No merger pressure

By SCOTT HUME

CHICAGO—Foote, Cone & Belding Communications chairman-ceo Norman Brown said last week he feels "no pressure" to seek a merger partner in the wake of recent agency combinations, and he assured shareholders that FCB has the domestic and international strengths and size to compete.

However, after the May 13 annual meeting, president-chief operating officer Abbott Jones acknowledged FCB is "working on a variety of acquisitions in several areas" to augment its "associated companies" stable of smaller, specialty shops.

Mr. Brown told shareholders that FCB three years ago "recognized [the] requirement to be larger, stronger and truly international."

That resulted in 17 acquisitions outside the U.S. (increasing to 38 from 22 the number of countries in which it operates) in the past three years, as well the recent acquisition of Leber Katz Partners, New York.

FCB's long-term future will be determined by four factors within its control, Mr. Brown said.

Those factors are the needs to maintain an effective international network, to offer a full spectrum of communication services, to strengthen significantly FCB's position in the New York market and to maintain the high level of its creative product.

"One either gets in this high-stakes game," Mr. Brown said of the need for a strong global presence, "or one drops out of the marketing/advertising big leagues."

In remarks after the meeting, Mr. Brown said FCB will "continue to be open to any action that advances our goal of being a complete, global agency." But he expressed some reservations about the recent spate of agency mergers and acquisitions.

"The core consideration is [an agency's] strength. And size and strength are not necessarily the same thing."

Mr. Jones added: "The first way to judge [the value of such mergers] is what clients do. Some will vote with their feet, making it interesting for the rest of us."

Mr. Brown said FCB still has had no direct contact with Burbank, Cal.-based Shamrock Holdings, which now holds 9.9% of FCB's stock (AA, Feb. 13, *et seq.*).

However, in indirect contact through investment counselor Goldman, Sachs & Co., FCB has communicated its intention to remain independent, he said.

At the meeting, shareholders ratified a "poison pill" amendment to its certificate of incorporation—surprisingly without question or discussion—intended to lessen FCB's vulnerability to a hostile takeover.

The amendment requires that all stockholder actions be taken during an annual or special meeting of the board (which can be called only by a majority of the board, the chairman or the president).

The net effect of the amendment is to make it more difficult to acquire control of the company by removing and replacing officers and directors.

Mr. Brown also denied that any conflict of interest would be involved in former FCB chairman John O'Toole's intention to serve as exec vp-government affairs for the American Assn. of Advertising Agencies (AA, May 12) in Washington while remaining on the FCB payroll.

FCB will pay Mr. O'Toole $154,000 a year for the next five years and $114,000 annually thereafter until Jan. 31, 1994, which exec vp-finance Allan Wilson Jr. explained is deferred compensation rather than salary.

Don't overlook clients: O&M exec

By STEWART ALTER

NEW YORK—The trend to giant global agencies based on acquisition is driven by "agency ambition, not client needs," Ogilvy Group chairman-ceo William Phillips told the company's annual meeting here last week.

"It remains to be proven that clients want this accumulation of size," Mr. Phillips said at the May 13 meeting.

"Resources, not size, are key. I don't hear clients saying 'Become larger through financial maneuver.' In fact, a number have said to me that they don't understand the recent spate of mergers and acquisitions."

Ogilvy has not stood apart from the industry trends. It made 17 acquisitions in 1985 ("none in the 'mega' category," Mr. Phillips said) and 10 so far this year, including Minneapolis-based Fallon McElligott Rice.

Mr. Phillips said Ogilvy "will soon be announcing a new phase for Meridian in the Pacific" and is confident "we can develop a fourth, and possibly fifth, sector for the Ogilvy Group."

The proxy statement for the meeting showed that the five most highly compensated executive officers in '85 were the same group as the year before: Mr. Phillips, $550,000 in cash compensation, compared with $529,300 in '84; Kenneth Roman, Ogilvy & Mather Worldwide president, $525,000, versus $475,900; Norman Berry, O&M creative head and president of O&M/New York, $520,000, compared with $485,400; Graham Phillips, chairman of O&M-U.S., $472,000, up from $399,300, and Michael Bail, vice-chairman, O&M Worldwide, $460,000, up from $435,000.

Quaker tries Life preserver

By JULIE FRANZ

CHICAGO—Quaker Oats Co. is looking to pump a little life into its Life brand ready-to-eat cereal with a $2 million promotion aimed at making children into commercial directors.

A May 5 freestanding newspaper insert invited children under age 12 to submit ideas for a Life tv commercial using a blank storyboard form found inside boxes of Life and Cinnamon Life cereals.

The grand-prize winner will go to Hollywood, courtesy of Quaker, and act as assistant director on the spot. The commercial probably will air during children's Saturday morning and after-school time slots, a Quaker spokesman said. The winner also gets $10,000.

Quaker is holding a separate contest for school groups. The company mailed lesson plans and storyboards to 350,000 art teachers of students aged 4 through 7.

The marketer chose the promotion because it appealed to both kids and adults. Life, Quaker's No. 2-selling cereal, has lost share in the $4.4 billion ready-to-eat cereal market as Kellogg Co., Battle Creek, Mich., and General Mills, Minneapolis, inundate the market with new products and ad dollars.

Life's share dropped just below 2% this year after holding a steady 2.2% share for several years, said Jack Maxwell, an industry analyst with Furman Selz Major Dietz & Birney, New York.

Quaker director of promotions Peter Consolazio, who also is vice-chairman of the Promotion Marketing Assn. of America, has left the company to pursue outside interests. Promotion manager Mary Whalan is stepping in as acting director-promotions.

BBDO handles the $8 million Life cereal account.#

National Yellow Pages
HOTLINE
Call with questions about your National Yellow Pages Program
1-800-742-1002
1-800-354-5677
In N.Y. State

If there's a 9-year-old Joe Sedelmaier out there, Quaker Oats hopes to find him or her with this promotion for its Life cereal. BBDO, Chicago, handles the account.

Addenda to Foreign Agency issue

The following additions and corrections are for listings appearing in the Foreign Agency Income issue (AA, April 21). Figures are in millions of dollars.

- The Brazil chart should have carried a footnote reading: "AA altered its procedure of determining an agency's "real growth" (applying 1985 exchange rate to 1984 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1984 are based on the average annual exchange rate (0.0007) of that year.
- Allen, Brady & Marsh, London, was listed twice. Correct figures are $8,292.0 for 1985 gross income and $54,601.8 for 1985 billings, putting the agency in 26th place.
- Hettinga, de Lang, Possel, de Boers, Amsterdam: 1985 gross income $886.8 on billings of $5,912.0, which lists that agency in 29th place. Both figures are estimates.
- Barretts, Capetown, South Africa: Gross income $555.6 and billings $3,346.4, ranking the agency in 14th place.
- Leo Burnett-France, Paris, 1985 billings should have read $15,814.0.
- Noordervliet & Winninghoff/Leo Burnett, Amsterdam: Billings for 1985 should read $27,800.3.
- Reklam Moran, Istanbul, an Ogilvy & Mather affiliate, submitted erroneous figures. Figures for 1985 should have read $932.4 for gross income and $6,405.0 for billings, ranking the agency seventh.
- Manajans/Thompson, Istanbul: Gross income for 1985 should read $2,710.3.
- Atlas Publicidad, Bogota, a J. Walter Thompson affiliate: billings figures for 1985 should have read $14,115.4.
- McCann-Erickson and J. Walter Thompson, both in Frankfurt, should have shown 1985 billings of $135,735.0 and $126,973.5, respectively; 1984 billings should have read $121,501.0 and $126,475.3.

Due to a computer error, the following agencies were omitted from the listings:

- Carvis Needham, Madrid/Barcelona: 1985 gross income $1,693.3, 54% increase over 1984; 1985 billings $10,340.0, putting Carvis in 24th place.
- Dr. Kosdorf & Partner, Vienna (Needham affiliate): 1985 gross income $570.0, 74% increase over 1984; 1985 billings $3,800.0, putting the agency in 18th place.
- Bergenholz & Arnesen, Copenhagen: 1985 gross income $944.0, 5% increase over 1984; 1985 billings $11,192.4, putting the agency in 17th place.
- BCP Strategy Creativity, Montreal: 1985 gross income $5,362.8, 35% increase over 1984; 1985 billings $35,751.3, putting BCP in 17th place.
- Publicis Intermarco-Farner, Frankfurt: 1985 gross income $7,110.0, 5% increase over 1984; 1985 billings $47,400.0, putting Publicis in 15th place.#

Jameson forms new shop

NEW YORK—Grybauskas & Partners Marketing has been formed by Jameson Advertising as a new subsidiary involved in new-product development and new markets for existing products, with an emphasis on direct-marketing services.

Located here at Jameson's offices at 96 Morton St., the venture was formed through the merger of Roland Grybauskas' company, Publishers Marketing Associates, with Jameson.#

More about Florida's Money Market

Ft. Lauderdale/South Palm Beach is the #1 major Florida market in per capita food and beverage sales.

The News/Sun-Sentinel delivers two out of three readers in Florida's affluent Money Market.

Fort Lauderdale/South Palm Beach
News/Sun-Sentinel
Florida's Money Market

Represented nationally by C.W.O. & O.; Sunday Magazine Network, in Florida by Publishers Representatives of Florida.

The News/Sun-Sentinel is a Tribune Company Newspaper.

Salary surveys

Table 2

1985 incentives

Per cent receiving and incentives as a per cent of base salary

Billing size group	% receiving	% of base
A: up to $5 mil.	21.6	21.1
B: $5 mil.-$10 mil.	54.0	16.2
C: $10 mil.-$25 mil.	45.0	17.5
D: $25 mil.-$100 mil.	45.4	22.5
E: over $100 mil.	35.1	23.4
All agencies	40.9	21.7

Table 5

1985 aggregate of top 10 total cash compensation as a per cent of billings

Billing size group	Aggregate of top 10 total compensation	Average billings	Aggregate as a per cent of billings
A: up to $5 mil.	$353,700	$2.7 mil.	12.0%
B: $5 mil.-$10 mil.	419,200	7.0 mil.	5.9
C: $10 mil.-$25 mil.	640,500	17.5 mil.	3.7
D: $25 mil.-$100 mil.	1,080,400	57.3 mil.	1.9
E: over $100 mil.	2,012,400	553.1 mil.	0.4

Table 6

1985 top 10 total cash compensation in agency management

	Group A: up to $5 mil.		Group B: $5 mil.-$10 mil.		Group C: $10 mil.-$25 mil.		Group D: $25 mil.-$100 mil.		Group E: over $100 mil.	
	Total comp.	% of top 10	Total comp.	% of top 10	Total comp.	% of top 10	Total comp.	% of top 10	Total comp.	% of top 10
Highest	$63,100	17.8%	$78,900	18.8%	$135,000	21.1%	$233,500	21.6%	$366,400	18.2%
Second	47,800	13.5	63,600	15.2	90,400	14.1	178,000	16.5	269,500	13.4
Third	40,100	11.3	50,800	12.1	80,000	12.5	123,000	11.4	232,200	11.5
Fourth	33,300	9.5	43,300	10.3	63,300	9.9	101,700	9.4	200,900	10.0
Fifth	32,300	9.1	37,800	9.0	56,000	8.7	86,300	8.0	194,200	9.7
Sixth	30,000	8.5	33,800	8.1	51,400	8.0	78,500	7.3	166,800	8.3
Seventh	28,600	8.1	29,800	7.1	44,700	7.0	74,300	6.9	156,600	7.8
Eighth	27,000	7.6	29,000	6.9	42,000	6.6	71,700	6.6	149,700	7.4
Ninth	26,200	7.4	26,700	6.4	39,300	6.1	69,000	6.4	142,100	7.1
Tenth	25,500	7.2	25,700	6.1	38,400	6.0	63,800	5.9	134,000	6.6
Total	353,700	100.0	419,200	100.0	640,500	100.0	1,080,400	100.0	2,012,400	100.0

Source: all charts on this page are © copyrighted 1986 by Cole Surveys, Inc.

Salary survey

(Continued from Page 1)

agencies billing more than $100 million, 78.9% received bonuses that averaged $40,800 each, or 27.8% of base.

- Clearly, bonuses played a big role in four of the five size groups. In the smallest agencies, with billings up to $5 million, only two in ten executives got one. In the next three size groups, agencies with billings of $5 million to $100 million, five of ten got them. In the more-than-$100 million class, 35.1% received an incentive in the calendar year.
- While there was some size-group variation in the percentage of those receiving a bonus, there was little difference in the average ratio of bonus-to-base pay. Those who received a bonus averaged close to the 20% of base mark in all size groups, including the smallest. (See Table 2.)

Between Dec. 31, 1984, and Oct. 1, 1985, those who received a base salary increase averaged 13.4%. This is 10.4% higher than the 3% rise in the cost of living for the period. It also exceeds by a sizable margin pay increases given in most other industries for a full 12 months.

- Topping the list with an average of 18.7% were the smallest shops (Group A), with billings of up to $5 million. Next in line were the Group B agencies, in the $5 million category, which averaged base salary increases of 16.6%.
- The next three size groups were bunched between 11.4% and 13.0%. (See Table 3.)

As a statistic, highest cash by position tells more than just who is on top. First, it is a real number, the amount someone actually received for services rendered. Second, it is an indication of how an industry values positions relative to each other. Third, it provides an interesting—if not perfect—comparison with other "un-like" industries.

Example: The highest-paid chief financial officer on our list earns total cash compensation of $425,200, second only to the survey's highest-paid ceo, one who runs a huge, self-standing agency conglomerate. The chief financial officer's earnings are also ahead—by a goodly amount—of other over-all managers, such as president-chief operating officer, exec vp and agency subsidiary ceo. His $425,200 is 31% higher than the $324,000 paid to banking's No. 1 chief financial officer. And he is 205% higher than the $140,000 paid to his opposite number in hospital administration.

More significantly, the highest-paid chief financial officer got 27% more in 1985 than the industry's highest paid creative director, a sure sign that the financial officer post in some of the largest agencies is highly valued. As agencies develop into huge conglomerates, especially when maintaining separate and decentralized subsidiaries, the executive who can get a handle on the control function, keep a lid on costs and affect the bottom line becomes the pivotal person.

Billing size key variable

While agency size tells more about how people are paid than almost any other factor, location in or near major ad centers—New York, Chicago, Los Angeles—also affects both salary and bonus levels. Here is a look at compensation for the 19 positions we broke out. (See Table 7.)

Chief executive officers (II and I): Cash compensation may be only part of a ceo's compensation. There are other "perks"—such as a company car.

For each top executive, size of agency makes a difference. In the largest companies, three of every four have a company car; in the smallest, it's one out of three.

Pensions, too, are much more likely to be part of the ceo's package in the largest companies—92% are in this kind of retirement plan. In the smallest companies, 59% offer pensions. (See Table 4.)

When it comes to pay levels, the averages show sharp upward movement among agency groups. The compensation for independent agency heads (ceo IIs) in the smallest size group is $68,100. It is $84,100 in the $5 million-to-$10 million group; $138,000 in the $10 million-to-$25 million group; $256,800 in the $25 million-to-$100 million group and $515,300 in the largest agencies.

But there are exceptions. In the smallest-size group, one ceo II made $141,600 last year. Yet his agency was last in the billings rankings among the nine companies reported. What's more, the $141,600 was higher than that received by any ceo II in the next-largest-size group and above the average ($138,400) in the $10 million-to-$25 million class.

The compensation of ceos of subsidiary companies follows a similar pattern, rising with agency size. Since subsidiary ceos tend to work for the larger agencies, they benefit more from some "exotic" pay-plan features than the heads of many independents. Thus, 86% of them received bonuses while 58% of the independent agency ceos did so. Their bonuses as a per cent of base, however, were identical—34.9%.

Presidents, chief operating officers and exec vps: The total cash received by the 45 presidents ranged from $67,500 in the smallest agencies to $246,300 in the large. Pay for presidents in the three smallest groups showed little size variation—Group A: $67,500; Group B: $69,000; Group C: $88,600. The average jumps to $165,700 in Group D ($25 million-to-$100 million), and to $246,300 in the over-$100 million Group E.

Forty-nine per cent of the presidents-chief operating officers received an incentive that averaged 29.3% of base. In the more-than-$100 million group, 71% got bonuses that averaged 34.4% of base.

The 51 exec vps in the survey received average pay of $99,100, or 22.3% below the average president-chief operating officer. Three of every four exec vps received an incentive, higher than for any position except subsidiary ceos and well ahead of the 58% received by independent ceo IIs. In the three largest-size groups, 30 of 34, or 88%, of the exec vps received incentives that came to 38.3% of their base pay.

Branch office managers: The 44 branch office managers reported by 26 agencies average $92,400 in pay; 57% received a 23.5% bonus. In agencies less than $100 million, their average bonus was 14.5%.

Chief financial officers: Our superstar chief financial officer and his $425,200 in pay is established as a trendsetter, pointing to a growing emphasis on controls and profitability. At present, the trend is visible only in the largest agencies, where the 10 chief financial officers reported average pay of $166,800, a hair above the $165,700 received by eight exec vps. Below $100 million, however, chief financial officers fall off sharply relative to exec vps.

Creative directors and associate creative directors: Twenty-nine of the 68 creative directors (43%) earned more than $100,000 in 1985. Six (9%) are paid more than $250,000. Three of the six (4%) are in the $300,000-plus bracket. The top three received an average base salary of $231,000, to which was added a bonus of $95,000 (41.1% of base) for total cash averaging $326,000. Only independent ceo IIs (with 12) report more in the more-than-$300,000 tier.

The average creative director received $109,500, but this figure was very much a product of billing-size mix. The two smaller-size groups averaged $49,800 and $47,400, respectively, in total cash. Their pay in the larger-size basic salary groups steadily increased—Group C: $78,000; Group D: $126,300, Group E: $172,300.

Associate creative directors averaged $83,800 in base plus bonus. Bonuses for associates came to 11.5% of base, compared with 26.3% for the directors.

More charts on Page 34.

Senior art directors and senior copywriters: The averages for these positions run neck and neck; only $100 separates the two. The 163 senior art directors are at $50,400, the 126 senior copywriters are at $50,300.

In the largest agencies, senior art directors average $60,300, while the senior copywriters average $59,100.

In all size groups, about one in five in these senior creative jobs received an incentive of 8% of base. In the largest agencies, seven of 76 senior art directors (9.2%) got 9.9% bonuses; nine of 61 senior copywriters (14.8%) got bonuses that averaged 10.6% of salary.

Directors of account management and senior account execs: Unlike the creative directors, where six earned more than $250,000 and three were more than $300,000, only one account management director went above $250,000. A salary of $180,000 and a 50% bonus of $90,000 brought total pay for this industry leader to $270,000.

The percentage of account management heads who received a bonus was 59%, virtually tied with creative directors. Average bonuses, however, were 20% of base—just below the 26.3% received by the creative directors.

The average compensation for account directors was $99,200. In $100-million agencies, the average total cash was $128,700.

The 304 senior account execu-

(Continued on Page 38)

Ben Cole is president-founder of Cole Surveys, Boston, and a vp-director of the company's parent, Wyatt Co. Cole, established in 1956 and a recognized leader in the compensation survey field, numbers among its participants the top 100 financial institutions. Wyatt Co. is an international benefits, compensation and risk-management company with offices in 55 cities in the U.S., Canada and overseas.

Salary surveys

Table 7

Executive positions

National summaries— 1985 total cash compensation *(thousands)*

	Group A: up to $5 mil.	Group B: $5-$10 mil.	Group C: $10-$25 mil.	Group D: $25-$100 mil.	Group E: over $100 mil.
Position 013-001: Ceo II (independent)					
Agencies	9	12	16	13	5
Incumbents	8	12	16	13	5
Quartile 3	$77.0	$113.0	$131.4	$315.0	$857.6
Weighted avg.	$68.1	$84.1	$138.4	$256.8	$515.3
Agency avg.	$68.1	$84.1	$138.4	$256.8	$515.3
Median	$55.5	$72.5	$112.5	$233.6	$475.0
Quartile 1	$53.5	$65.6	$84.0	$175.5	$393.2
[illegible]					
Position 013-005: President and ceo					
Agencies	8	6	11	13	5
Incumbents	7	6	11	13	7
Quartile 3	$82.2	$87.7	$115.0	$209.9	$287.1
Weighted avg.	$67.5	$89.0	$88.6	$165.7	$241.2
Agency avg.	$67.5	$89.0	$88.6	$165.7	$246.3
Median	$62.0	$65.1	$89.6	$185.0	$220.5
Quartile 1	$54.0	$47.5	$68.4	$107.0	$202.3
[illegible]					
Position 013-009: Exec vp					
Agencies	8	6	10	12	4
Incumbents	9	6	13	15	8
Quartile 3	$60.4	$90.6	$135.7	$140.0	$184.3
Weighted avg.	$47.8	$65.7	$97.3	$109.4	$165.7
Agency avg.	$49.1	$65.7	$85.4	$111.0	$202.1
Median	$45.3	$57.8	$78.1	$104.0	$143.7
Quartile 1	$32.3	$38.8	$60.3	$89.2	$108.0
[illegible]					
Position 810-241: Traffic manager					
Agencies	6	9	11	11	10
Incumbents	6	9	13	12	16
Quartile 3	$26.6	$24.9	$26.3	$40.0	$36.0
Weighted avg.	$20.7	$20.7	$21.5	$33.2	$31.1
Agency avg.	$20.7	$20.7	$21.5	$33.6	$33.9
Median	$19.0	$20.5	$20.0	$33.3	$29.2
Quartile 1	$15.5	$17.9	$16.5	$25.4	$24.3
[illegible]					
Position 810-305: Associate creative director					
Agencies	1	3	11	17	12
Incumbents	1	3	16	46	67
Quartile 3	—	—	$63.8	$82.3	$122.0
Weighted avg.	$30.0	$41.3	$56.5	$89.7	$102.7
Agency avg.	$30.0	$41.3	$56.8	$89.2	$105.3
Median	—	—	$51.8	$68.3	$97.0
Quartile 1	—	—	$45.8	$51.0	$81.0
[illegible]					
Position 810-310: Senior copywriter					
Agencies	4	8	14	16	11
Incumbents	4	9	20	32	61
Quartile 3	$24.8	$33.7	$42.0	$53.1	$70.0
Weighted avg.	$21.1	$29.8	$36.8	$51.5	$59.1
Agency avg	$21.1	$28.5	$37.2	$58.6	$94.9
Median	$20.0	$28.0	$36.3	$48.0	$56.5
Quartile 1	$18.6	$24.1	$29.8	$43.9	$48.3

Table 3

1985 base salary increases

Average increase as a per cent of base salary for those receiving an increase

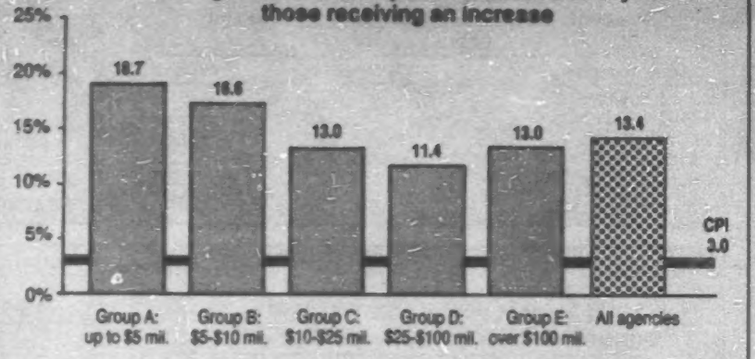


Table 7, cont'd.

	Group A: up to $5 mil.	Group B: $5-$10 mil.	Group C: $10-$25 mil.	Group D: $25-$100 mil.	Group E: over $100 mil.
[illegible]					
Position 810-332:Associate media director					
Agencies	1	3	5	13	12
Incumbents	1	4	5	20	35
Quartile 3	—	$32.3	$32.5	$50.0	$68.6
Weighted avg.	$14.8	$27.9	$27.6	$43.9	$56.7
Agency avg.	$14.8	$27.2	$27.6	$43.0	$56.9
Median	—	$28.5	$26.0	$46.4	$58.0
Quartile 1	—	$23.0	$23.4	$37.9	$45.0
[illegible]					
Position 810-338: Print production manager					
Agencies	4	12	12	15	9
Incumbents	5	12	13	20	10
Quartile 3	$41.3	$31.7	$40.3	$48.0	$61.2
Weighted avg.	$27.2	$30.3	$34.7	$40.5	$52.1
Agency avg.	$23.7	$30.3	$35.6	$44.3	$52.1
Median	$22.5	$29.6	$30.6	$39.8	$49.3
Quartile 1	$15.4	$26.0	$25.7	$29.6	$37.6
[illegible]					
Position 810-390: Director of account management					
Agencies	2	4	10	16	11
Incumbents	2	5	12	33	36
Quartile 3	—	$106.5	$79.5	$104.6	$149.4
Weighted avg.	$25.0	$72.7	$84.2	$88.4	$128.7
Agency avg.	$25.0	$82.7	$66.5	$97.5	$155.1
Median	—	$85.0	$70.8	$84.5	$124.8
Quartile 1	—	$32.8	$48.4	$66.8	$94.1
[illegible]					
Position 810-390: Market research manager					
Agencies	1	3	9	16	12
Incumbents	1	3	10	17	31
Quartile 3	—	—	$55.8	$77.1	$70.5
Weighted avg.	$50.0	$44.9	$48.0	$63.4	$63.9
Agency avg.	$50.0	$44.9	$49.5	$65.2	$91.9
Median	—	—	$46.0	$67.9	$53.0
Quartile 1	—	—	$35.0	$46.2	$37.4

N- No data reported for size group

Source: all charts on this page are © copyrighted 1986 by Cole Surveys, Inc.

Salary survey

(Continued from Page 33)

tives averaged $52,400 and 31% got bonuses of 16.1%. Agency size made less difference here: Group A: $27,100; Group B: $39,300; Group C: $44,100; Group D: $54,500; Group E: $59,400. Only $15,300 separated the Group C ($10 million-to-$25 million) average from the Group E (more than $100 million) average. This 35% difference in the averages is much smaller than that recorded for the same two size groups in associate creative director (82%), senior art director (50%) and senior copywriter (61.8%).

Media directors and associate media directors: Steep climbs based on agency size characterize the pay levels of these positions. Average media director pay was $57,600, with 43% receiving incentives of 19.1% of base.

The average may not be representative of what is really going on, since the pay for these positions is weighted heavily by the fact that 37 of the 65 (57% of the total) are from the smaller companies. The average pay of the 37 is $33,900. By contrast, the average pay of those in Group D was $64,400 and in Group E, $141,000. The nine highest paid are at agencies billing more than $100 million; their pay ranges from $101,500 to $275,000. In the largest agencies, 78% of the media directors received bonuses of 28.2%.

Sixty-five associate media directors earned an average of $48,100 and 28% got bonuses of 9.2%.

Broadcast production managers and print production managers: The 27 broadcast production managers averaged $62,600; 52% received bonuses of 12%. In the largest-size group, average total pay was $86,300 and one of every two got a 13.3% bonus.

The average pay of 60 print production managers ranged from $27,200 to $52,100. Forty-two per cent received bonuses of 13%.

This is another position with a relatively flat curve among the size groups of agencies. Nine of the 60 reported (15%) earn more than $50,000. Five of the nine work for agencies with less than $100 million in billings.

Market research managers: Here's a position for which size of agency hardly counts at all. For example: The 17 market research managers in the $25 million-to-$100 million group average $63,400, just $500 less than the $63,900 the 31 managers in the more-than-$100 million group receive.

There is not much pattern to incentives, either. Over-all, 37% received a 16.8% bonus. Average pay for all 62 is $60,100. This is a position whose pay is directly related to the individual rather than the agency size.

Public relations managers: The 33 public relations managers reported in the survey averaged $53,600. Seventeen (51.5%) received bonuses of 12.3%. There was a direct correlation with agency billings—Group B: $35,100; Group C: $49,600; Group D: $59,400; Group E: $65,400.

Traffic managers: Average pay for the 56 reported is $26,500. A good benchmark job—with little variation based on agency size. One in four (23.2%) received a modest bonus in 1985—6.1% of base salary. One manager earned $56,200.

Top ten compensation

No two agencies are precisely alike, even when—or perhaps especially when—they are both subsidiaries of the same parent. Each agency has its own special strengths that affect the kind of business it goes after. These lead to differences in how each is organized—that is, where positions fall in the top-management hierarchy.

In Agency A, an exec vp handles the creative function with a creative director reporting to him. In Agency B, all the top creative team leaders report on a solid-line basis to the ceo, who wants to be involved in all major creative decisions affecting certain clients; there is no one person charged with responsibility of the creative director. In Agency C, a vice-chairman handles high-level creative activity; the chairman-ceo looks after management and acquisitions and is hardly involved in the details of client campaigns.

Because of this organizational diversity, it's useful to look at the aggregate compensation of the 10 highest paid in management without regard to position. Now agencies A, B and C can be compared with one another on how each compensates its 10 highest-paid executives, both as individuals and in total.

As with the 19 title comparisons, billing size has the greatest impact on executive pay, for the top 10 varies from $353,700 ($35,370 per executive) in the smallest billings-size group—up to $5 million in billings—to $2.01 million ($201,240 per individual) in the more-than-$100 million group.

But as with most industries, pay doesn't exactly keep pace with size. For example, it takes $1 million to pay the top 10 in an agency billing $57.3 million (Group D) and $2 million pays the top 10 in the agency that is almost nine times larger—one billing $553.1 million (Group E).

The difference in average revenues between the two groups is $495.8 million. The difference in the top 10 aggregate total cash pay between the two size groups is $932,000. Thus, for every million dollars of added billings, the pay of the top 10 goes up by only $1,880 per year in total ($932,000 divided by 495.8) or an average of $188 per executive.

Table 5 shows how each of the top 10 highest-paid executives fares in the various-size groups. There is a remarkable consistency in the data. The highest-paid executive receives between 18% and 22% of the total cash compensation of the top 10 in all five billing size groups. The 10th-highest-paid gets between 6% and 7.5% of the aggregate pay of the top 10. This consistency occurs in the base salary data, too.#

About this survey

Cole Surveys worked with Advertising Age to create this 1st Survey of Top Management Compensation. This is a cooperative venture designed to provide an accurate analysis of top management compensation while maintaining the confidentiality of participants.

A total of 92 agencies participated. Billings were used as the indicator of agency size. After examining the data, we divided the survey participants into five billing-size groups: Group A (up to $5 million), Group B ($5 million to $10 million), Group C ($10 million to $25 million), Group D ($25 million to $100 million) and Group E (more than $100 million).

The survey participants were further broken down into the four regions used by Advertising Age. The East includes 29 participants, or 31% of the total; the South has 21 participants, or 23%; the Midwest includes 30 participants, or 33%, and the West has 12, or 13%.

The largest agency in the survey reported billings of more than $3.5 billion. The smallest were two agencies which both reported billings of $1 million.

Total cash compensation was collected for the 10 highest paid in management and for the defined 19 key management positions.

Of the 1,654 executives reported in this year's study, 1,340 were slotted into one of the defined "benchmark" positions. The remaining 314 executives were considered by their agencies to have duties other than those described in the 19 key positions.

Each agency submitted the following data: Base salary as of Dec. 31, 1984, and Oct. 1, 1985. Incentive paid in 1985, usually for 1984 performance.

Individual employe information was submitted, identified by number. Employe identification numbers will be used to update our annual surveys.

All data received from participants were diagnosed. When necessary, agencies were called with questions. All data were carefully scrutinized before being entered into the database.

Each agency is assigned a code, which is included in the position arrays for ceo IIs and ceo Is. This confidential code, known only to each participant, is sent to each agency that submitted data. Using the code, agency management can see how the total cash compensation of its ceo compares to the compensation of similar agencies.

The results published here are excerpts from a much more comprehensive report prepared by Cole Surveys. Agencies that submitted data for this year's survey can receive the complete individualized survey results in a "Confidential Report" that displays its own data compared with two peer groups or clusters.

Agencies that did not participate in this survey but would like to obtain the full report may order an off-the-shelf version that contains the same information on all 19 benchmark positions (base salaries and total compensation). This report is available for $245.

An individualized "Confidential Report" or a nonindividualized "Position Report" is available by calling Cole Surveys at 1-800-343-2215.#

Sun-In spots go swimmingly

Shoots is a weekly report on recently produced commercials, listing the products, agencies and production houses.

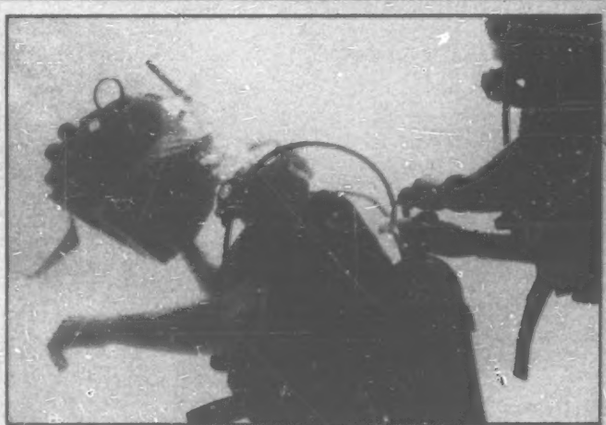
Sun-In hair lightener will be advertised in two new tv :30s by Chattem Inc., Chattanooga, breaking in late May on network tv via Hill, Holliday, Connors, Cosmopulos, New York. Both were shot in St. Thomas, Virgin Islands, by Bert Steinhauser Productions, New York. For one :30, Mr. Steinhauser hauled his equipment—a camera, a 20-lb. scuba tank and a 20-lb. weighted belt to keep him from rising—to the bottom of a 14-ft.-deep swimming pool for the underwater scenes. For the above-water scenes, the director (perched on a scaffolding he had built) filmed model Julie Shay standing on a cliff 20 ft. above the Caribbean. As she is about to dive, a voiceover man in the finished spot will say, "Every summer has its highlights. Moments that shine above the rest. Sun-In creates brilliant, memorable highlights for your hair." Ms. Shay then sprays the product into her hair. The actual dive was done by Donna Keegan (a diver/stuntwoman who did Kathleen Turner's stunts in "Romancing the Stone"). Mr. Steinhauser then mixed all the footage so viewers think the actress was diving and that the underwater scenes were shot in the Caribbean rather than a pool. The spot ends with a bottle of Sun-In resurfacing.

SHOOTS

In a second :30, Ms. Shay is seen reclining on her beach blanket. A man, unseen except for his feet, then kicks a soccer ball toward her and knocks over her Sun-In bottle. The sunbather likes the man and, as the spot ends, the two are seen—legs only—walking off together. In a piece of casting reminiscent of Hitchcock, Joe Shelesky, the agency's vp-associate creative director, cast his legs in the walk-off scene. Other agency creative credits: Jean Borofsky, art director; Michael Marx, copywriter, and Carrie Cook, producer. Other production credits: Carol Case, exec producer, and Alexis Caydam, hair stylist/makeup artist.

A new generic-image spot for Woodward & Lothrop, a Washington department store chain, uses pillars, columns and arches as backdrops for models and carries the theme "Woodies is my way." Saffer Cravit & Freedman Advertising, Toronto, produced the spot.

Woodward & Lothrop, the Washington department store chain known to its customers as "Woodies," has finished four :30s for spring/summer for swimwear, gold jewelry, an anniversary sale and generic image; all feature the theme "Woodies is my way." The generic image spot uses pillars, columns and archways as backdrops for the models. All were produced by Saffer Cravit & Freedman Advertising, Toronto.



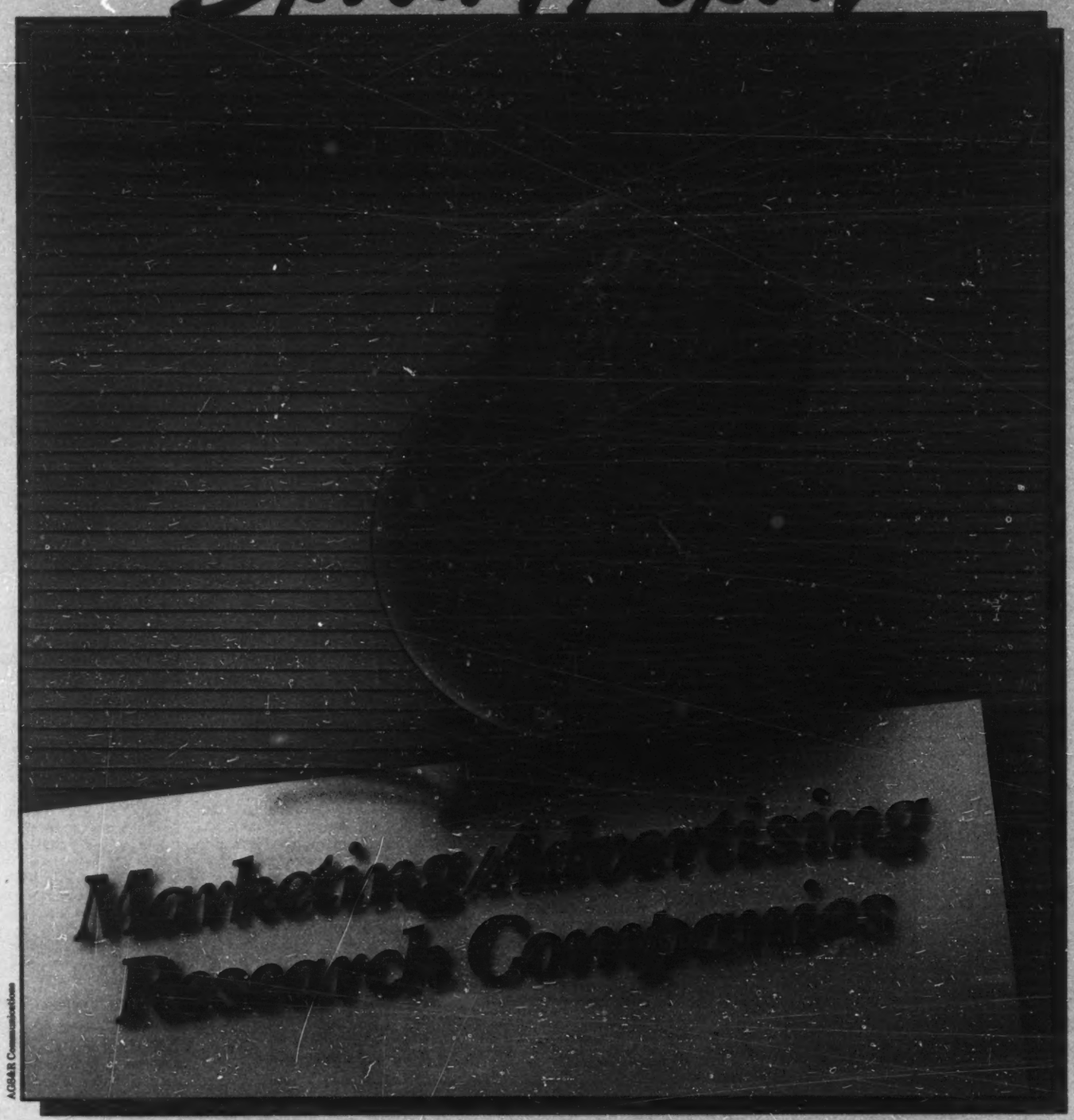
Director Bert Steinhauser, Bert Steinhauser Productions, New York, turned scuba diver to shoot the underwater scenes of a new commercial for Sun-In hair lightener by Chattem Inc., Chattanooga, Tenn. Hill, Holliday, Connors, Cosmopulos, New York, handles.

Six Flags Atlantis, Hollywood, Fla., promotes "the world's largest water theme park" with a new tv :30, half of which features Warner Bros. animation of Bugs Bunny, Sylvester, Daffy Duck and other "Looney Tunes" members as they set out for the park in a big bus. Credits: Forsyth & Connors, agency, and G. Civins Productions.

AT&T has finished an internal communications film in which Tammy Grimes supplied the six-minute opening narration and James Earl Jones handled the 10½-minute closing narration at Howard Schwartz Recording's New York studio. Production credits at Creative Establishment, New York: Diana Da Davis, exec producer; Bruce Schulter, art director, and Fred Rossi, production coordinator. AT&T's creative team: Barbara Evans, division manager-program development, and Dave Thomas, exec producer.#

Shoots is compiled by New York-based senior editor James P. Forkan.

Special Report



AGE&R Communications

Worldwide revenues for top 44 up 11.5%

By Jack J. Honomichl

The marketing/advertising/public opinion research industry had some good news and bad news in 1985, according to ADVERTISING AGE's 12th annual review of industry performance.

The bad news first. Total worldwide revenues of $1,652,500,000 for 44 leading companies were up 11.5% from 1984, and after adjustment for inflation (3.6%, according to the U.S. Department of Labor Consumer Price Index-U, monthly average), the real growth rate was 7.9% —off from 9.4% in 1984 and 8.1% in 1983.

The good news was that even so, research revenues grew far faster than the revenues of top U.S. ad agencies. The differential was greater than is shown on the accompanying table because the ad agency revenue growth has not been adjusted to account for acquisitions.

For the research companies affected by acquisition, growth rates are calculated on the year-long volume of both companies for 1984 and 1985. This superior performance regarding agencies is well known to some service company analysts in the financial world, and it helps explain why several agencies have acquired research companies.

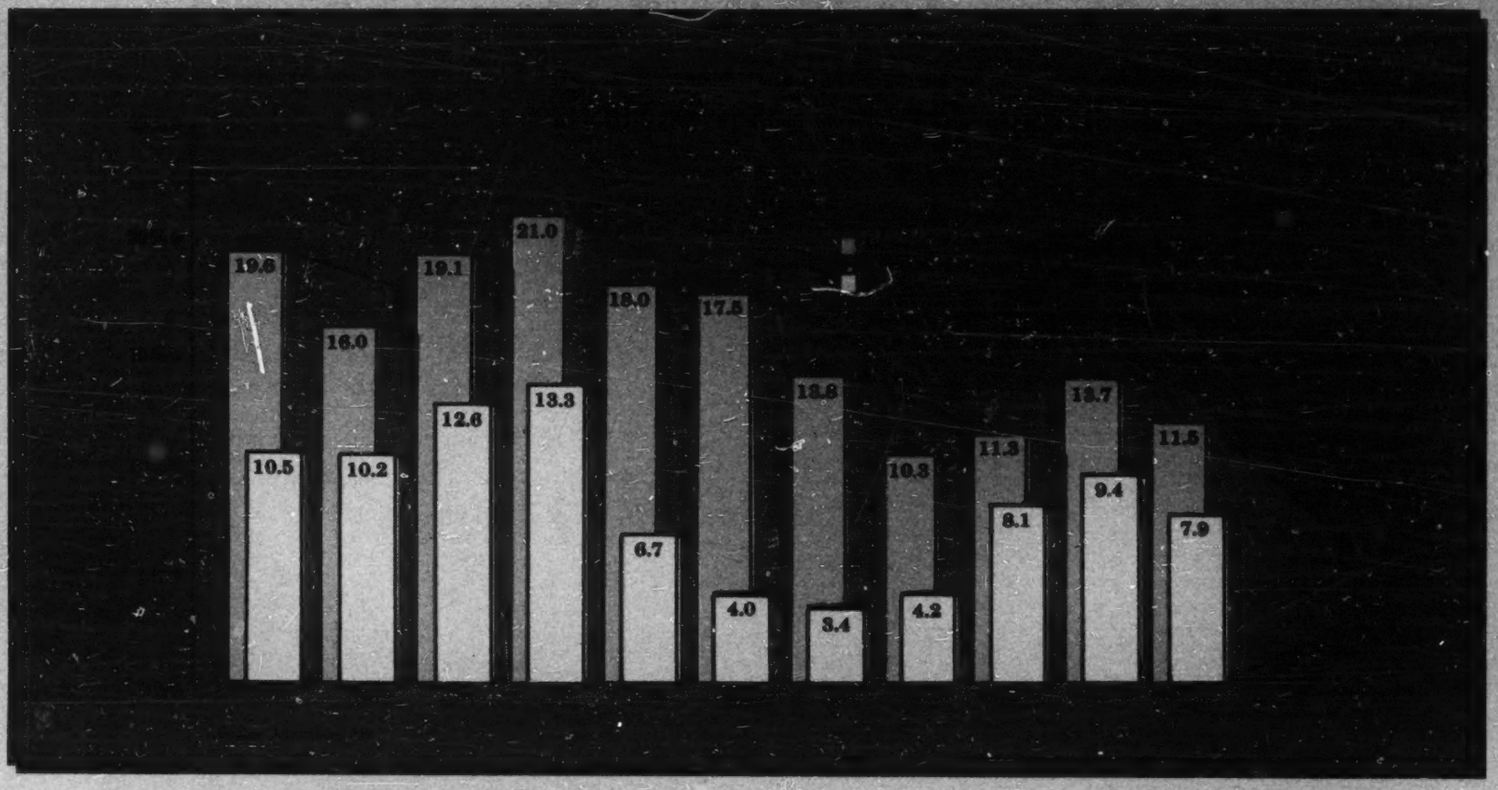
Although research growth slowed—real growth was 7.9% in 1985, 9.4% in 1984—revenues increased faster than those of top U.S. advertising agencies.

This compilation is based on 44 U.S. research organizations and includes five additions not on last year's list—Lieberman Research West, Marketing Research Services, National Research Group, J.D. Power & Associates and Guideline Research. (Management Decision Systems, which appeared on last year's list, this year is merged with Information Resources Inc., No. 5.)

Twelve of the 44 top companies had 1985 revenue declines from 1984 or an increase that was less than the 3.6% inflation rate of 1985. Only one of these 12 was in the top 15.

(Continued on Page S-2)

Jack J. Honomichl writes a regular column on research in ADVERTISING AGE.



Worldwide revenues rise

(Continued from Page S-1)

While some of the dropoff is explained by a lack of political polling activity, which ran up revenues in 1984, and a decline in tv commercial testing, the rest seems to suggest that 1985 was a mixed bag, with the larger database operations showing the greatest strength and the smaller survey-oriented companies showing the most weakness.

This trend is evident in the supplemental information supplied by the Council of American Survey Research Organizations, which obtains year-to-year revenue data from some of its member companies on a confidential basis. For 1985, CASRO supplied revenue data on 56 companies, mostly smaller survey organizations, that were not included in the top 44 listing. These revenues totaled $132.8 million in 1985, up 10.9% from 1984.

Acquisitions were big news again in 1985, the most important being the purchase of Management Decision Systems (No. 30 on the 1984 listing) by Information Resources Inc. (No. 5 on the 1985 list). IMS International's U.S. subsidiary bought Luning Prak Associates, and Saatchi & Saatchi bought Clancy, Shulman & Associates and then merged it with what was Yankelovich, Skelly & White to form YSW/Clancy, Shulman (No. 15).

Mediamark Research purchased NABSCAN and Market Facts acquired the Tortorello Group. One of the biggest acquisitions this year was the Selling-Areas Marketing Inc.'s (No. 3) acquisition of Burke Marketing Services Inc. (No. 6). Together these organizations will form the second largest research organization in the world.

Seven of the top 44 in this listing had significant revenues from operations outside the U.S., which totaled $369.8 million, volume that did not grow appreciably in 1985. During most of the year, these overseas revenues were affected by the strong U.S. dollar.

The U.S.-only revenues of the top 44 were $1,282,700,000, up 13% from 1984 or 9.4% real growth after adjustment for inflation. Presumably, this relationship will shift in 1986 because of reevaluations of the dollar that started in late 1985.

Three of the top 44 companies listed this year—YSW/Clancy Shulman, NFO Research and Media Mark Research—with combined revenues of $63.5 million, are owned by British companies headquartered in London. This development is expected to continue because other British companies are shopping for acquisition and mergers in the U.S. now.

The top 44 listing identifies 73 people as either chairmen, presidents, partners or executives. They range in age from 34 (Robert Shulman, new president-chief executive officer of YSW/Clancy, Shulman) to 70 (Edward C. Bryant, chairman of WESTAT). The average age is 49.8. Generally, these top people have an advanced degree—the M.B.A. is most common—obtained at a major university in the Midwest. Of the 73 top executives, three are women: Judy Corson, a partner at Custom Research Inc.; Sharon Munger, president of the Marketing Services Group at M/A/R/C, and Catherine Paura, president of the National Research Group.

Following are profiles of 1985's top 44, including the news they made during the year and their plans for 1986.

Nation's top 44 research companies profiled

1 **A.C. Nielsen Co.,** Northbrook, Ill. Founded in 1923 and since 1984 wholly owned by Dun & Bradstreet Corp. Revenues in 1985 were $517 million, up 7.7% from 1984.

These revenues have been adjusted to reflect the divestiture of Compucon, a separate organization with revenues of $11 million, which previously has been lumped by ACN into its Media Research Group. The growth has been calculated on a comparable base (excluding Compucon) from 1984 to 1985.

The Marketing Research Group, which has operations in 26 countries after adding Denmark and Taiwan in 1985, had revenues of $414 million in 1985, an increase of 6.7% from 1984. The Media Research Group had revenues of $103 million, an increase of 12%—in part because of the expansion of meter audience measurement service in Houston, Miami and Denver. About $268.8 million, or 52%, of

Henry Burk
A.C. Nielsen Co.

ACN's total revenues come from operations outside the U.S. The company does not release exact figures.

During 1985 in the U.S., the Marketing Research Group launched SCANTRACK US, which produces consumer purchase information on a weekly basis with data collection via UPC scanners in 1,600 supermarkets. The SCANTRACK service will offer local reports on 25 markets, and by the end of 1987, the plan is for 35 individual market reports.

To accompany SCANTRACK, the group now offers a delivery system called SCAN*FACT, which includes on-line access and downline loading to client computers.

Another new service, SCANTRACK PLUS, will provide market-specific data for evaluation of expenditures and the effectiveness of promotion offerings (such as coupons and tv advertising), as well as for tracking competitive activity and other factors influencing the market, such as weather and unemployment.

ACN's Media Research Group, which now has local-market meter panel service in 12 major markets, has announced it will expand its people meter test to 1,000 households nationally by this fall, and if validation tests are satisfactory, it will replace its national diary sample with the people meters.

Other new services in the making: A cable ratings system called Cable Audience Profile to provide a gauge for local ratings in relation to national ratings, both based on Nielsen Station Index diaries in the four sweep periods, and Monitor-Plus, which utilizes computerized pattern recognition to automatically identify tv commercials and report their start time and duration, a service now being tested in various markets, including New York, Chicago and Tampa.

As part of the merging of ACN-D&B activities, both the Marketing and Media Research groups now report to John C. Holt, exec vp in charge of D&B's marketing information services. ACN's research groups have 14,150 employes.

ACN chairman Henry Burk, 59, is also a member of the D&B board. Mr. Burk has a degree in economics from St. Gall Graduate School of Economics in Switzerland. Richard W. Vipond, 58, is president of Nielsen Marketing Research, and James D. Lyons, 51, is president of Nielsen Media Research.

2 **IMS International,** New York. Public corporation traded over the counter and founded in 1954. Research revenues in 1985 were $171.1 million, up 11.4% from 1984.

These revenues do not include those of Luning Prak Associates and L.P. Audits, acquisitions made in the U.S. in late 1985.

How the top 44 U.S. research companies compare with the top 44 U.S. advertising agencies

	Top 44 U.S. advertising agencies*	Top 44 U.S. research companies**
Revenues—1985 (in millions)		
Worldwide	$6,510.8	
U.S. only	4,378.4	
Revenue growth rate (1985 over 1984)		
Worldwide	+10.9%***	
U.S. only	+ 8.7%***	

*Source: Advertising Age U.S. Agency Profiles, 3/27/86

**Top 44 (see accompanying article). These figures account for marketing/advertising research operations only. In fact, many of the companies listed have larger total revenues, as is explained in individual company profiles.

***These percentages are not perfectly comparable to the top 44 research growth rates in that some of the agencies may reflect revenue growth in '85 attributable to acquisitions. In the top 44 research list, this has been corrected for by using the two (company plus acquisition) total revenues for both '84 and '85 to calculate growth rate. It was not possible to do this for the advertising agencies.

Nation's top 44 research companies

IMS has a battery of market research services and syndicated reports, most of which are related to the worldwide pharmaceutical industry.

Data series pertain, for instance, to ethical pharmaceuticals, over-the-counter pharmaceuticals, medical diagnoses and treatments, medical promotional efforts, hospital and laboratory supplies, animal health products and personal care products. Also, in the U.S. IMS has services related to the liquor industry.

Robert Louis-Dreyfus
IMS International

IMS has operations in 60 countries, although not all its services are offered in each of the countries. The company produces various reports on the pharmaceutical markets in an additional 23 countries. IMS has nearly 3,000 employes in its market research activities, with the Market Research Division accounting for 76% of total revenues.

The U.S. subsidiary, IMS America, Ambler, Pa., had 1985 revenues of $86.9 million, up 22.9% from 1984. Overseas revenues were up 2.1%. As with A.C. Nielsen Co., the other worldwide giant, overseas revenues suffered through most of the first part of 1985 because of the strong U.S. dollar.

During 1985 IMS introduced new additions to its on-line database services. The software package MICROLINK increases the efficiency with which clients can utilize its on-line services. IMBASE, a text retrieval system, also was introduced in 1985.

In December, IMS announced the intended acquisition (for $38 million in IMS stock) of Clark-O'Neill with the intent of developing in North America a fully integrated sales management information system combining profiling of physicians, sales demographics, call reporting and promotional services, with direct on-line access by all levels of pharmaceutical sales management and field force.

President-chief executive officer Robert Louis-Dreyfus, 39, who has an M.B.A. from Harvard University, has offices in New York and London. Andrew L. Clark, 60, is chairman. Serge Okun, 39, is president of the U.S. subsidiary; he is a graduate of the National School of Statistics and Economic Administration in Paris.

3 **Selling Areas-Marketing Inc.**, New York. Wholly owned subsidiary of Time Inc. founded in 1966. Revenues in 1985 are estimated at $138.5 million, up 17% from 1984.

The big news at SAMI is the recent acquisition of Burke Marketing Services Inc., No. 6 in this listing, followed by the start of ScanAmerica, a joint venture with No. 4 Arbitron Ratings Co. ScanAmerica, technology for which has been in test in the Denver area of dominant influence, calls for a national panel of households, each equipped with people meters, that also captures purchase records of UPC-identified package goods via a wand that is part of the meter and computer apparatus.

SAMI's basic business is the amalgamation of warehouse withdrawal data on thousands of package goods sold through food stores. Reports are produced on 28-day cycles for each of 54 marketing areas. In 1985, SAMI launched a comparable report service based on drugstores. This service is producing reports in 11 markets. This will be expanded to 30 markets by mid-1986, and nationally projected data are expected to follow.

Also in 1985, SAMI introduced its SAMSCAN service

Carlyle Daniel
SAMI

based on product movement data from samples of UPC scanner-equipped supermarkets. By the end of 1986, SAMI plans to have 15 major markets involved in this service. SAMSCAN reports are produced on 500 product categories on a weekly basis.

Also in 1985, SAMI purchased the rights to the Telecount System, which electronically records, via computer, the running of tv commercials. This is expected to be the basis for a service competing with A.C. Nielsen Co.'s proposed Monitor-Plus system.

SAMI has 344 fulltime, salaried employes in three offices.

President Carlyle C. Daniel, 55, is a graduate of Lynchburg College. He is also a Time Inc. vp.

4 **Arbitron Ratings Co.**, New York. Founded in 1948 and since 1967 a wholly owned subsidiary of Control Data Corp. Revenues in 1985 were $122 million, up 15.3% from 1984.

Arbitron owns about 40% of Burke Marketing Services, No. 6 in this listing. Revenues from that association are not included in the above figures.

Arbitron produces radio, tv and cable audience studies at the local-market level using mail diaries or panels of meter-equipped households. Surveys in 214 tv markets, 11 of which are measured by a combination of meters and diaries, account for 52% of Arbitron revenues; 48% comes from measurement of 260 radio markets.

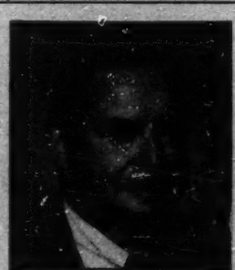
In 1986, Arbitron will expand radio audience measurements in 75 markets year-round by conducting four 12-week-long surveys each year. Also this year, Arbitron is using a redesigned radio diary that picks up am or pm on individual listings and a new report format will contain data on overnight listening, listening location and audience composition.

Arbitron reports are available to clients (radio and tv stations, advertisers and agencies) via printed reports; computer-based applications such as Arbitrends and Product Target AID, which deliver updated data from the company's mainframe to clients for custom tabulation and analysis, and an on-line database called Arbitron Information on Demand (AID).

During 1985, the Arbitrend II system was enhanced to provide more detailed information and flexibility, and a new report, Arbitrends Multi-Market Report, which allows clients to track the performance of any selected tv program across all metered markets, was introduced.

In 1986, Arbitron plans a new service called Client Audience Profile (CAP) Matrix, which will provide product usage indexes for tv program and time period audiences using age-sex indexes provided by Simmons, Scarborough and MRI, along with life-style cluster indexes from Donnelley/Simmons.

In early 1986, it was announced Burke Marketing Services, including Arbitron's share, was to be purchased by Selling-Areas Marketing Inc. (see No. 3) and the new SAMI-Burke organization and Arbitron jointly would fund development of ScanAmerica, a single-source research system that has been in development test in Denver. ScanAmerica electronically



Theodore Shaker
Arbitron Ratings Co.

measures tv viewing of individuals via a people meter and tracks the products purchased by panel households via an in-home portable scanner that reads UPC bars on package goods.

Arbitron has 1,057 full and parttime employes in 21 U.S. locations. A telephone interviewing center in Laurel, Md., has 55 stations.

Chairman-chief executive officer Theodore Shaker, 64, attended Colgate, Northwestern and New York universities. A.J. "Rick" Aurichio, 49, president-chief operating officer, has an M.B.A. from Fairleigh Dickinson University. Both are vps of Control Data Corp.

5 **Information Resources Inc.**, Chicago. Public company traded over the counter founded in 1977. Revenues in 1985 were $75.1 million, up 22.9% from 1984.

Revenues include the full absorption of Management Decision Systems (No. 31 in last year's listing), which IRI acquired in 1985; growth rate is

Gian Fulgoni
Information Resources

based on combined revenues of both companies for 1985 and 1984. About 4% of revenues come from outside the U.S. Now in Japan, Australia, France and the U.K., IRI plans to expand into Canada and West Germany in 1986.

During 1985, the management personnel and services of IRI/MDS were merged, and new or modified services were developed.

The main service, BehaviorScan test markets, used for advertising and promotion testing and new product test marketing, increased the number of panelists in each of eight markets from 3,000 to 3,500. Two new BehaviorScan markets will open in 1986.

An expanded ASSESSOR simulated test marketing system was launched in 1985 to predict sales volume and market share of a new product at any point in the product development cycle (a merger of the MDS product ASSESSOR and the IRI service FASTRAC). IRI has recruited a separate UPC scanner panel of 20,000 households, whose purchase behavior is continuously monitored for ASSESSOR studies.

The Marketing Fact Book service, beyond the eight BehaviorScan markets, expanded data collection facilities by opening installations in neighborhood locations in six new cities during 1985, bringing the total number of IRI-monitored households to 40,000. In 1986, plans for additional urban neighborhood installations bring the total panel size up to 60,000.

In late 1985, IRI acquired Keystrokes Inc., a New Jersey company that monitors newspaper feature ads and consumer promotions, such as coupons and refund offers in about 130 markets.

The new service is called FeatureScan.

In 1986, IRI plans to introduce three services: pcEASY-TRAC, a micro software package for intelligent marketing workstations; pcEASYCAST for sales forecasting, and pcEXPRESS for user analysis of marketing, financial and forecasting data on the user's own personal computer.

IRI has 1,000 employes in seven U.S. branch offices.

Chairman John Malec, 41, is a graduate of the University of Wisconsin. President-chief executive officer Gian Fulgoni, 38, has a master's degree from Manchester University in England.

6 **Burke Marketing Services Inc.**, Cincinnati. Founded in 1947 and since 1984 owned in part by Arbitron Ratings Co. (No. 4). Revenues in 1985 were $73.1 million, up 10.8% from 1984.

Jack Brown
BMSI

About 5% of BMSI revenues come from outside the U.S. through Burke Canada, a wholly owned subsidiary, and Burke International, a joint venture with the German research company Infratest, which owns 5% of BMSI. BMSI also owns 5% of Infratest. The sale of BMSI to Selling-Areas Marketing Inc. (No. 3), a subsidiary of Time Inc., took place May 6.

In the U.S., BMSI consists of five groups:

Burke Marketing Research specializes in custom survey research and tv copy testing (DAR and SELECTOR services) and —as of 1985—package testing using Burke's eye-movement research technology. Also, starting in 1986, Burke will market the advertising campaign evaluation service of Communicus, a Los Angeles-based company specializing in communications research.

The Burke Institute markets an extensive curriculum of courses related to marketing research.

The Test Marketing Group is revising its existing laboratory market system (AdTel) with the ViewScan system, a cable system based on household panels in test markets that pinpoints tv test copy on target households, meter measures audience viewing and collects product movement data at both the retail (UPC scanning) and household level (in-home scanning of UPC via wand).

ViewScan system expansion into additional markets is planned for 1986. Also in 1985, the Promotion Decisions unit of the Test Marketing Group introduced a series of new services —Coupon AccuRate, Coupon Trac, Coupon Custom Trac and PROPHET—all designed to assist clients to improve the efficiency of coupon promotions.

BASES, a leader in the predictive market modeling area (which saw its business grow 40% in 1985), opened client service offices in Chicago and San Ramon, Cal., in 1985 and introduced new services: SOVA (Source of Volume Analysis), PASS (Positioning Analysis and Segmentation Summary) and Concept Designer, the last of which combines a predictive concept testing system with a hybrid conjoint analytical approach to help refine concepts.

Burke Marketing Services, which specializes in tv copy testing and custom survey work, recently introduced STARTER (Syndicated Tracking of Awareness, Reported Trial and Estimated Repeat), a survey that automatically tracks new products being rolled into national distribution.

The main development at BMSI (pending the acquisition by SAMI) is ScanAmerica, a single-source tv audience-product movement service (currently being tested in the Denver area), which will be developed and marketed by SAMI-BMSI and Arbitron Ratings Co.

BMSI has a fulltime staff of 520 in 42 offices. Phone facilities consist of 200 WATS lines, 160 CRT-equipped.

Chairman Jack E. Brown, 42, attended the University of Cincinnati.

7 **M/A/R/C Inc.**, Dallas. Public corporation traded over the counter founded in 1965. Research revenues for the fiscal year ended March 31 were $46.3 million, up 23% from the previous fiscal year. Unaudited total M/A/R/C revenues for the current fiscal year were $53.6 million.

In January, 1985, the company made a public offering of its stock. Also, in 1985, M/A/R/C opened a new 40-position, CRT-equipped central interviewing facility in McKeesport, Pa., and a comparable 56-station facility in Somerset, N.J.. This brings the total central facility telephone network up to 275 positions, CRT-equipped. M/A/R/C also opened new client service offices in Minneapolis and Los Angeles.

Cecil Phillips
M/A/R/C

M/A/R/C's Local Market Network (local field services with CRT-equipped interviewing positions on-line to computers in Dallas) was expanded to 30 markets. (This phoning capacity brings the total to about 490 positions.) The LMN on-line service provides toplines, quota control, monitoring and the capability to modify questionnaires or field instructions instantly in local-market personal or telephone interviewing situations.

M/A/R/C also established a census-balanced national mail panel to provide nationally projectable samples in addition to its Neighborhood Panel clusters around independent field services. Combined, the panels comprise more than 300,000 households.

In May, 1986, the company moved to a new six-story corporate headquarters building near Dallas-Fort Worth Airport.

As of April 1, M/A/R/C discontinued its Trendex buyership service, the company's only syndicated research product, which it acquired in 1983.

M/A/R/C has 339 salaried and 186 hourly staff employes in 18

How they rank
1985 revenues
44 leading U.S. research organizations

Rank 1985	Rank 1984	Organization	Total research revenues* (millions)	% change vs. 1984**	Research revenues from outside U.S. (millions)
1	1	A. C. Nielsen Co.	$517.0	+ 7.7%	$268.8 est.
2	2	IMS International	171.1	+11.4	86.9
3	3	SAMI	138.5	+17.0	–
4	4	Arbitron Ratings Co.	122.0	+15.3	–
5	6	Information Resources	75.1	+22.9	3.0 est.
6	5	Burke Marketing Services	73.1	+10.8	3.7
7	8	M/A/R/C	46.3	+23.0	–
8	7	Market Facts	37.8	+ 5.1	–
9	9	NFO Research	34.3	+16.3	–
10	10	NPD Group	33.1	+13.4	–
11	11	Maritz Market Research	30.0	+21.4	–
12	12	Westat	25.2	+ 3.3	–
13	13	Elrick and Lavidge	24.6	+ 5.6	–
14	14	Walker Research	20.7	+ 7.1	–
15	15	YSW/Clancy Shulman	19.5	+14.7	1.0
16	16	Chilton Research	19.1	+15.8	–
17	22	Simmons Market Research Bureau	16.5	+32.0	–
18	18	Louis Harris and Associates	15.8	+ 3.3	5.5
19	17	ASI Market Research	15.7	– 4.3	–
20	19	Opinion Research Corp.	14.5	0.0	–
21	21	Wirthlin Research	14.4	+11.6	–
22	24	Decision Center	13.8	+35.3	–
23	20	Ehrhart-Babic Group	13.8	+ 4.2	–
24	25	Hawk-Hanks Marketing Services Group	11.7	+20.3	–
25	23	Data Development Corp.	10.9	+ 3.8	–
26	28	Custom Research	9.7	+12.8	–
27	29	National Analysts	9.6	+21.5	–
28	34	Mediamark Research	9.5	+23.1	–
29	27	Admar Research	9	+ 3	–
30	33	Starch INRA Hooper	8.9	+18.5	–
31	26	McCollum/Spielman Research	8.8	– 6.4	–
32	32	Gallup Organization	8.6	+11.7	–
33	–	National Research Group	8.0	+73.1	9
34	36	Response Analysis	7.6	+35.0	–
35	39	Decision Research Corp.	6.8	+23.6	–
36	30	Decision/Making/ Information	6.7	–14.1	–
37	35	Market Opinion Research	6.5	– 5.0	–
38	–	Guideline Research	6.5	+18.0	–
39	37	Ad Factors Marketing Research	5.9	– 1.0	–
40	–	J.D. Power & Associates	5.8	+ 6.0	–
41	–	Lieberman Research West	5.3	– 2.6	–
42	–	Marketing Research Services	5.1	+89.0	–
43	40	Gridley-Smith	5.0	+ 2.7	–
44	38	Keppler Marketing Research	4.8	–19.5	–
		Sub total, top 44	$1,582.5	+11.5%	$369.9
		All other (56 CASRO companies not listed in top 44)	132.8***	+10.9%	
		Total (100 organizations)	$1,715.3	+11.5%	$369.9

*Total revenues (net, including intercompany sales, for some companies, are significantly higher. This information is given in the individual company profiles in the main article.

**Rate of growth from year to year has been adjusted so as to not include revenues gained from acquisitions. See main article for explanation.

***Total revenues of 56 survey research companies—over and beyond those listed in top 44 list—that provide financial information on a confidential basis to CASRO.

Top 44 research companies

U.S. offices.

Cecil B. (Bud) Phillips, 61, is chairman-president-chief executive officer. He is a graduate of Southern Methodist University. Marketing Research Group president Peter B. Bogda, 40, received his B.S. from Duquesne University. Marketing Services Group president Sharon Munger, 38, received a B.A. from Vanderbilt University.

8 **Market Facts,** Chicago. Public company traded over the counter, founded in 1946. Revenues for 1985 were $37.8 million, up 5.1% from 1984.

This marketing research conglomerate, founded by William F. O'Dell (now retired), is celebrating its 40th anniversary.

Above revenues do not include Market Facts of Canada, which is 50% owned by Market Facts.

In addition to traditional survey research capabilities, the major data collection facilities of Market Facts include: Consumer Mail Panel, a fixed mail panel of 235,000 households; Consumer Opinion Forums, a network of six mall interviewing sites; two national telephone centers with a total of 116 interviewing stations (including 65 that are CRT-equipped), and Marketest, a controlled store auditing facility for custom test marketing and in-store experimentation.

Verne Churchill
Market Facts

Market Facts is organized by client service groups, which specialize in fields such as industrial marketing, financial services, public sector research and healthcare.

During 1985, Market Facts acquired the Tortorello Group, a New Jersey-based survey company that emphasizes shareholder research, public opinion research and research related to mergers and acquisitions. Also, Market Facts recently launched a new weekly telephone omnibus service called TeleNation.

There are 526 fulltime, salaried Market Facts employes in seven U.S. offices.

President-chief executive officer Verne B. Churchill, 53, received his M.B.A. from Indiana University. Chief operating officer Greg Spanga, 49, received an M.B.A. from Bernard Baruch College.

9 **NFO Research,** Toledo, O. Founded in 1946 and since 1982 a wholly owned subsidiary of AGB Research. Revenues in 1985 were $34.3 million, up 16.3% from 1984.

NFO maintains a fixed mail panel with 350,000 households, or 800,000 individuals, representing one in every 270 U.S. households. Panel households are cataloged by demographic and product ownership characteristics and are available for custom-designed mail and telephone surveys.

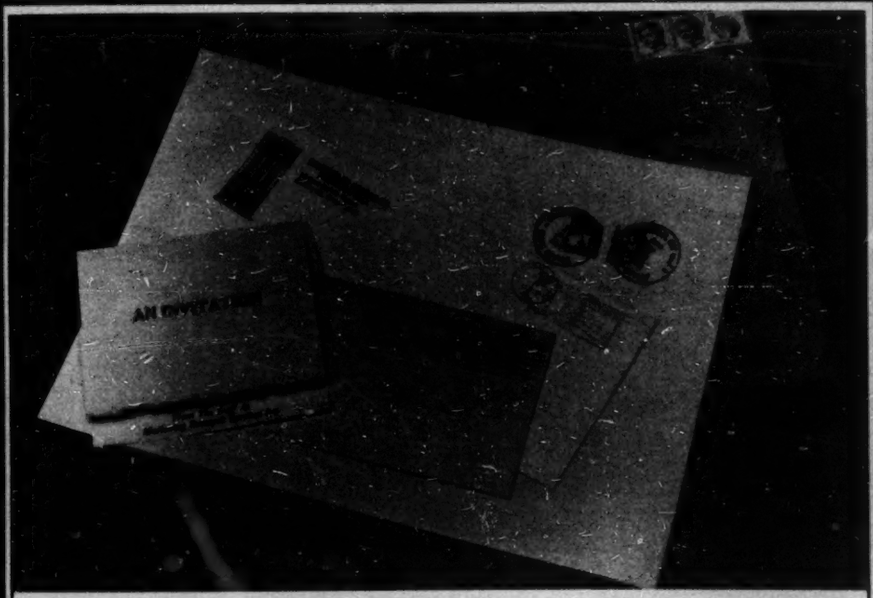
NFO has two central telephone interviewing facilities with 200 stations, including CATI interviewing, located in Toledo and Greensboro, N.C.

Via its mail panel and telephone interviewing capabilities, NFO conducts concept and product testing, tracking, attitude and usage studies, and market segmentation studies. Also, several proprietary segmentation systems—VISION, ACORN, CLUSTERPLUS, PRIZM and VALS—are used for analyzing survey data.

William Lipner
NFO Research

The Multi-Client Services Group operates syndicated services for the beverage, mail order, floor covering and toy industries. Toy-Trac, new in 1985, surveys 16,800 children annually to determine awareness, ownership and desirability for the toy, doll and game industry.

In 1985, NFO purchased a majority interest in SRG International, forming NFO/SRG International, White Plains, N.Y., to serve clients in western Eu-



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Top 44 research companies

rope, the Asia Pacific region, Latin America and the Middle East.

Also in 1985, NFO introduced a new questionnaire design system utilizing laser printing, a new CATI interviewing system and significant data processing software enhancements. Its Analytical Services Group has been expanding its capabilities.

President-chief executive officer William E. Lipner, 39, holds degrees in electrical engineering and business administration from the University of Toledo.

10 **NPD Group**, Port Washington, N.Y. Privately held corporation founded in 1953. Revenues in 1985 were $33.1 million, up 13.4% from 1984.

NPD Group, with 545 fulltime employes (of whom 335 are salaried), is organized by five divisions: NPD Package Goods, a 14,500-household national diary purchase panel specializing in package goods plus more than 25 local-market panels with about 40,000 households (NPD is the U.S. member company in the Euro-Panel group); NPD Special Industry Services, which has purchase diary, mail panels and point-of-sale computerized audits, specializing in product classes such as toys/games, textile/apparel, petroleum/automotive, sports equipment and jewelry; GDR/CREST Enterprises, a panel reporting on meals eaten away from home and also providing consulting to the food service industry; Home Testing Institute, a fixed mail panel with 175,000 households, and Marketing Models, which specializes in proprietary models such as ESP (for pretest marketing, new product forecasting) and PSA (for preference structure analysis).

During 1985, NPD launched the HTI/JFY Super Panel, 10 million households prescreened for brand usage patterns, and

Tod Johnson
NPD Group

opened a second WATS phone interviewing facility in Maryland (bringing the total NPD system up to 75 stations, 40 of which are CRT-equipped).

New York is set up as a Marketrax scanner market, and another market will be added before yearend. The Apparel Point-of-Sale Tracking Service is being expanded to include women's wear. In a joint venture with Future Computing, HTI will be tracking behavior in the personal computer market. In January, NPD Group became a minority shareholder in ISL International Survey Ltd., Toronto, the diary purchase panel of Canada.

President-chief executive officer Tod Johnson, 41, holds an M.S.I.A. degree from Carnegie-Mellon University, Pittsburgh. Founder, chairman and joint owner of NPD is Henry Brenner, 71.

11 **Maritz Market Research Inc.**, St. Louis. Wholly owned subsidiary of Maritz Inc. founded in 1973. Revenues in 1985 were $30.0 million, up 21.4% from 1984.

In addition to operating full-service survey research offices in Los Angeles, St. Louis, Minneapolis, Detroit, Toledo and New York, MMRI in 1985 opened offices in Dallas and Atlanta. Complementing its full-service divisions, MMRI operates 20 field service offices, 20 mall sites, 25 test kitchens and three WATS survey centers. Central telephone lines exceed 400. MMRI's 189-station CATI phone and mall interviewing system added three cities in 1985, making the total 15.

New services added in 1985: MAPPS (Maritz Advertising Product Positioning System), a

William Lewellen
Maritz Market Research

product development model; MIVIS (Maritz Interactive Video Interviewing System), an advanced laser videodisc microcomputer used in testing multiple visual options; Pin-Point, a market information service for the corrugated industry, and through its Agricultural Division, a new menu-based access system called Discovery.

In 1986, MMRI will introduce Explorer, a computer-assisted decision support system that allows database access for custom cross-tabulations, statistical analyses and graphs. Plans are to introduce a new market segmentation technique also.

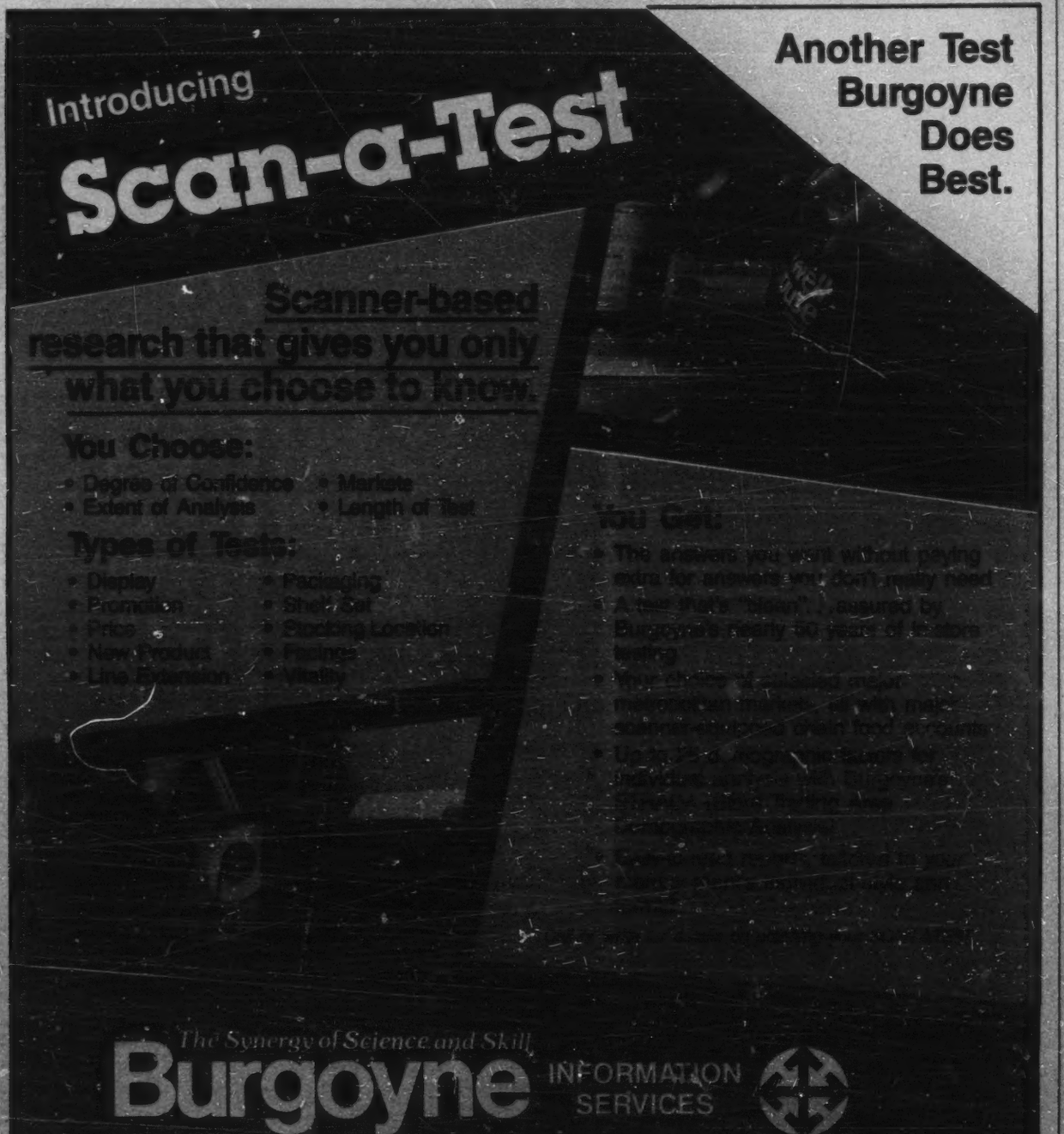
MMRI employs 172 fulltime, salaried exempt employes, 68 nonexempt support personnel and about 2,000 parttime interviewers and supervisors.

President William H. Lewellen, 55, holds an M.S. degree from St. Louis University.

12 **Westat**, Rockville, Md. An employe-owned corporation founded in 1961. Research revenues in 1985 were $25.2 million, up 3.3% from 1984.

Revenues include those of Crossley Surveys, a subsidiary of

Joseph Hunt
Westat



Top 44 research companies

Westat specializes in large-scale survey research, about 85% of which comes from work for federal agencies.

The staff includes 255 exempt salaried professionals (up 6% from 1984), about 65 nonexempt staffers and an average of about 325 telephone interviewers, support and survey processing, and national field studies personnel. There is an office in New York and phone facilities include 75 stations, half of which are CRT-equipped.

President-chief executive officer Joseph A. Hunt, 50, has an M.S. from Massachusetts Institute of Technology. Edward C. Bryant, 70, the founder of Westat, is chairman; he has a Ph.D. from Iowa State University.

13 **Elrick & Lavidge,** Chicago. Founded in 1951 and since 1980 a wholly owned subsidiary of Equifax Inc. Revenues in 1985 were $24.6 million, up 5.6% from 1984.

Revenues from Quick Test Opinion Centers are included. The Philadelphia-based subsidiary operates 19 mall interviewing facilities, three of which, Denver, Chicago and Hayward, Cal., were opened in 1985.

Robert Lavidge
Elrick & Lavidge

E&L specializes in survey research for consumer and business-to-business clients through full-service offices in Atlanta, Chicago, San Francisco and Paramus, N.J., which was added in 1985. In addition, four field offices, including the 1985 addition of Cincinnati, specialize in various types of interviewing: mail, central location testing, telephone and face-to-face.

E&L employs 223 salaried workers, 165 of whom are exempt.

During 1985, E&L tripled its computer capacity. The company is entering the syndicated service field, offering computerized sales and inventory data gathered from consumer durable goods retailers. Tv sets and floor coverings are the first product classes covered.

President Robert J. Lavidge, 64, received his M.B.A. from the University of Chicago.

14 **Walker Research,** Indianapolis. Privately held corporation founded in 1964. Revenues in 1985 were $20.7 million, up 7.1% from 1984.

This company, with 135 full-time, salaried employes, 164 fulltime hourly workers and 571 parttimers, is successor to a local field interviewing agency, Walker Research Service, founded in 1939. During 1985, Walker moved into a new 90,000-sq.-ft. corporate headquarters building on the outskirts of Indianapolis.

Walker is divided into: Client Services Division, which provides traditional custom ad hoc surveys through five office locations; Marketing Sciences Division, which provides strategic research and consulting services, and Operations Division, which offers data collection and processing services through a network of eight offices in five states. These include telephone (Walker has more than 240 interviewing stations, the majority of which are equipped for CATI), mall intercept, prerecruited central location and mail.

Frank Walker
Walker Research

During 1985, Walker started Walker Clinical Evaluations to conduct Phase 3 clinical investigations and trials with human subjects to provide objective, scientific assessment of the efficacy and safety claim substantiation of Food & Drug Administration-controlled products.

Chairman-chief executive officer Frank D. Walker, 51, is a graduate of DePauw University. President-chief operating officer James E. Sarmer, 47, received his M.B.A. from Michigan State University.

15 **Yankelovich Skelly & White/Clancy, Shulman,** Westport, Conn.

Robert Shulman
YSW/Clancy, Shulman

Founded in 1958 and since 1984 has been a wholly owned subsidiary of Saatchi & Saatchi. Research revenues in 1985 were $19.5 million, up 14.7% from

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Top 44 research companies

1984.

Revenues include what were Yankelovich Skelly & White and Clancy, Shulman, which was acquired by Saatchi & Saatchi in 1984 and merged with YSW, and the research portion of McBer & Co., which was also part of the YSW Group. Growth is calculated on a comparable base, 1985 over 1984.

This organization underwent considerable change in 1985 and early this year. In addition to the merger and name change, the company closed its New York office and consolidated operations in Westport, Conn.

Several key executives (AA, April 14) left to join a new organization, Daniel Yankelovich Group, founded by former YSW chairman Daniel Yankelovich. Also, Florence Skelly, formerly president-chief executive officer of YSW Group, left to found a new research consulting company, Telematics Inc.

The merged YSW/CS is organized into five research groups: Syndicated Services Group, Corporate Profiles Group, Market Response Modeling Group, Technical Services & Licensing Group and Strategic Research & Modeling Group.

Major services are: Monitor, an annual survey of social change, now in its 17th year; the Viewpoint Series, surveys addressed to business-to-business marketing issues such as investor relations, media relations, public policy issues, corporate image and communications, modeling services, and Litmus, a sales forecasting model combined with the Laboratory Test Market service to provide simulated test marketing services. Litmus is now available in Europe, Asia, Australia and Canada, and further expansion is planned for 1986.

YSW/CS has 87 fulltime, salaried employes in three offices.

President-ceo Robert Shulman, 34, is a graduate of Eisenhower College. Exec vp Kevin Clancy, 43, received a Ph.D. from New York University.

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16 **Chilton Research Services,** Radnor, Pa. Founded in 1957; since 1979 a wholly owned subsidiary of American Broadcasting Co. Revenues in 1985 were $19.1 million, up 15.8% from 1984.

This organization conducts

Gilbert Barrish
Chilton Research

custom ad hoc marketing and social science surveys for industry and the federal government. While some data collection is via mail or face-to-face interviewing, the bulk is via telephone.

Chilton has one of the industry's largest CATI systems, which has on-line sample control and interactive cross-tabulations. The system is driven by Chilton's twin IBM 4341 computers and has 185 interviewing stations.

A third telephone interviewing center dedicated to a TELSAM/PULSE system for Ameritech was opened in Madison, Wis., in 1985. In 1986, a fourth center with 60 work stations will be opened in Manoa, Pa. Chilton has 185 fulltime, salaried employes.

Director Gilbert Barrish, 46, is a graduate of Temple University.

17 **Simmons Market Research Bureau,** New York. Unit of MRB Group, a wholly owned subsidiary of JWT Group, founded in 1978. Revenues in 1985 were $16.5 million, up 32% from 1984.

In May, SMRB became part of a new JWT Group profit center, MRB Group, which includes 13 research organizations worldwide with annual revenues of about $35 million.

Main service is the Simmons annual "Study of Media and Markets," based on a sample of 19,000 adults, covering exposure to all media, brand usage, leisure activities, life styles and so on. Subscribers to this syndicated database include agencies, media and major advertisers. Clients are offered on-line access to the database, and in 1985 SMRB introduced a microcomputer system called CHOICES, which makes data available on disk for use on IBM and IBM-compatible computers.

Also in 1985, SMRB co-sponsored (along with Scarborough Research Corp.) the largest study of national newspaper readers—156,000 interviews in 56 markets.

The Custom Studies Division recently created a new unit to develop research in the financial services field, while the twice-annual "Simmons National College Market Study," the most inclusive of its type, was broadened to include students' perceptions of major corporations.

Frank Stanton
SMRB

SMRB has 152 fulltime, salaried employes.

President-chief executive officer Frank Stanton, 56, has an M.A. from the University of Pennsylvania.

18 **Louis Harris & Associates,** New York. Founded in 1956 and since 1975 a wholly owned subsidiary of Gannett Co. Revenues in 1985 were $15.8 million, up 3.3% from 1984.

Thirty-five per cent of Harris revenues come from non-U.S. subsidiaries: Louis Harris International (London), Louis Harris France (Paris) and Louis Harris Medical Surveys (London).

Founded by Louis Harris, the well-known pollster syndicated in 150 newspapers, the U.S. custom survey operation consists of the following divisions: Telecommunications, computers, healthcare, banking and financial services, automobiles and public policy and corporate affairs. Multiclient surveys track corporate, financial, public and leadership opinions and behavior. About 40% of the company's U.S. work and 20% of the international is for foundations, governmental agencies and other nonprofit entities.

Louis Harris
Harris & Associates

The New York and Washington offices house 200 fulltime, salaried employes. A phone interviewing facility (90 stations, 40 CATI-equipped) is in New York.

Chairman-chief executive officer Louis Harris, 65, is a graduate of the University of North Carolina at Chapel Hill. President-chief operating officer Humphrey Taylor, 51, is a graduate of Cambridge University (England).

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Top 44 research companies

19 **ASI Market Research**, New York. Founded in 1962 and since 1983 a wholly owned division of IDC Services. Revenues in 1985 were $15.7 million, down 4.3% from 1984.

ASI consists of two divisions: Advertising Research, which specializes in controlled audience pretesting and on-air testing of tv commercials, testing of print ads and evaluating entertainment projects, including pilots for tv and movie films; and Marketing Research, which conducts custom ad hoc surveys, focus groups and other qualitative studies. (Included in the Marketing Research Division as a separate profit center is Lehman Custom Research, Norwalk, Conn.) The division operates a central telephone interviewing facility with 120 stations.

Gerald Lukeman
ASI Market Research

During 1985, ASI expanded its Recall Plus CATV testing system to 11 test cities; introduced Tru-Share, an unusual on-air, multicity persuasion methodology; launched Print Plus, a natural exposure, comprehensive print-testing service, and launched Focus Plus, a new focus group facility in Manhattan.

ASI has 125 fulltime, salaried exempt employes and about 600 parttimers.

President-chief executive officer Gerald Lukeman, 54, is a graduate of Dartmouth College. He is also exec vp of IDC Services.

20 **Opinion Research Corp.**, Princeton, N.J. Founded in 1938 and since 1975 a wholly owned subsidiary of Arthur D. Little Inc. Revenues in 1985 were $14.5 million, unchanged from 1984.

This organization provides full-service survey research and analytical and design services, emphasizing market research, data collection, awareness, trial and usage studies, corporate image and product image, media studies, financial industry, telecommunications, government research, employe relations and public opinion research.

Irwin Miller
Opinion Research Corp.

Expertise is provided through the Cable/Video Research Center, the Financial Services Group, the HealthCare Research Center, the Telecommunications Section and the Organisational Research Group. In addition, ORC specializes in multivariate data analysis and market modeling techniques. Several shared-cost surveys are available, most notably the every-other-weekly General Public Caravan and the quarterly Executive Caravan.

ORC operates a CATI-based system with 125 interviewing stations. Its technical center is a computer-based network that coordinates sample preparation and control, telephone interviewing, data processing and quality assurance.

ORC has about 200 fulltime, salaried employes in Princeton and branch offices in New York, Washington, Chicago and San Francisco.

In late 1985, ORC announced formation of a new wholly owned subsidiary, Market Resources Corp., which will provide telemarketing and direct marketing services to a broad range of clients.

Chairman-chief executive officer Irwin Miller, 57, has a Ph.D. from Virginia Polytechnic Institute. President-chief operating officer Andrew Brown, 41, has an M.B.A. from Temple University. Vice-chairman Harry O'Neill, 57, has an M.S. from Pennsylvania State University.

21 **Winona Research**, Minneapolis. Privately held corporation founded in 1953. Revenues in 1985 were $14.4 million, up 11.6% from 1984.

This full-service research company has 125 fulltime, salaried employes in two offices—Minneapolis and Phoenix. A New York office recently was closed.

More than half of Winona's volume comes from telephone interviewing, and its Phoenix site houses a WATS line and CATI facility with 200 stations.

Richard McCullough
Winona Research

The balance comes from invoice store audits, product research and mail work.

President Richard McCullough, 42, is a graduate of the University of Minnesota.

22 **Decisions Center Inc.**, New York. Privately held corporation founded in 1965. Revenues in 1985 were $13.8 million, up 35.3% from 1984.

DCI, which has 135 fulltime, salaried employes, includes Decisions Center, Murray Hill Center (three focus group conference rooms), Analytic Insights, Express Data Center and Facts Center, a 94-station telephone interviewing facility. All are in one Manhattan building.

Bernard Ruderman
Decisions Center Inc.

DCI specialises in custom sur-

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vey research—large-scale market structure and strategy studies, tracking studies, copy research, legal studies, and concept and product testing.

Much of the year's revenue growth came from Express Data Center, which was launched in mid-1985. EDC provides computerized transmission of survey data from a network of mall locations to the company's VAX 750 computer in New York. Tabulation is instantaneous and clients are able to access data through their own personal computers. In early 1986, the EDC network was expanded to 12 cities, and eight more will added by yearend.

DCI is managed by three partners: Bernard Ruderman, 54, who has an M.S. from Pennsylvania State University; Bernard Levine, 60, and Steven Roth, 40, both with M.B.A.s from New York University.

23 **Ehrhart-Babic Group,** Englewood Cliffs, N.J. Privately held corporation founded in 1959. Revenues in 1985 were $13.8 million, up 4.2% from 1984.

E-B, with 105 fulltime, salaried employes, specializes in instore research through the following:

E-B Custom Research, which conducts sales measurement studies, including minimarkets, controlled store tests, projectable audits, trend audits, and more; National Retail Tracking Index, which conducts regularly scheduled syndicated retail observation checks in 125 major markets (SAMI definition), 8,000 retail outlets, including food, drug, mass merchandise, convenience and hardware/home centers; National Liquor, Wine and Beer Index, which provides quarterly distribution data on more than 2,600 off-premise outlets and 3,100 on a twice-a-year basis, and Measurement of Trade Cooperation, a syndicated weekly survey of in-store promotion support with supermarkets.

In 1986, E-B will check drugstores on a monthly basis in all SAMI drug markets and add close to 1,000 stores on a weekly schedule.

Thomas Ehrhart
Ehrhart-Babic Group

The Liquor Service will check 1,123 outlets during the Christmas season. Also in 1986, E-B will introduce a Toy Observation Index in 20 areas of dominant influence and 1,119 stores.

Chairman Thomas A. Ehrhart, 61, is a graduate of Pace University, and president Louis J. Babic Jr., 53, is a graduate of Boston University.

24 **Harte-Hanks Marketing Services Group,** River Edge, N.J. Wholly owned division of Harte-Hanks Communications founded in 1975. Revenues in 1985 were $11.7 million, up 20.3% from 1984.

This conglomerate, part of the large Texas-based publishing company, includes RMH Research, a full-service survey company specializing in communications and media research; National WATS Service, a telephone interviewing facilitywith

Richard Hochhauser
Harte-Hanks Marketing

75 stations, some of which are CRT-equipped, and Urban Data Processing, a Burlington, Mass.-based EDP service company that specializes in custom processing of census data for marketing applications. UDP accounts for more than 40% of total revenues.

Harte-Hanks has about 100 fulltime, salaried employes in three offices.

President Richard Hochhauser, 41, holds an M.B.A. from Columbia University. He recently assumed the additional post of president of Harte-Hanks' Direct Marketing Group.

25 **Data Development Corp.,** New York. Privately held corporation founded in 1960. Revenues in 1985 were $10.9 million, up 3.8% from

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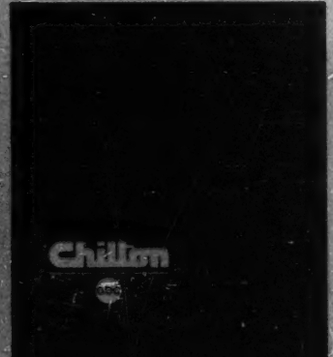

Top 44 research companies

26 **Custom Research Inc.**, Minneapolis. Privately held corporation founded in 1974. Revenues in 1985 were $9.7 million, up 12.8% from 1984.

This custom survey company is organized by divisions: Consumer Research, Medical Research Bureau, Custom Research Telephone (central telephone WATS interviewing, CRT-equipped, with 50 stations), Corporate Services and, as of 1985, Custom Research International.

Judith Corson
Custom Research Inc.

CRI has 85 fulltime salaried employes and about 175 part-timers located in four offices. The San Francisco office opened early this year.

CRI is managed by two partners, Jeffrey L. Pope, 45, who received his M.B.A. from the Kellogg School of Management at Northwestern University, and Judith S. Corson, 43, a graduate of the University of Minnesota.

Jerry Rosenkranz
Data Development Corp.

This custom survey organization has 112 fulltime salaried employes in four offices plus the Telephone Center, an interviewing facility with 70 stations (60 CRT-equipped) in New Rochelle, N.Y.

DDC emphasizes design and analysis and specializes in strategy and market studies, tracking studies, concept-product and copy testing. Proprietary methodologies include COMBO (product testing), COPY II (copy strategy) and ADOPTER (pretest market measurement systems), the latter being a joint venture with Edward Tauber, University of Southern California.

During 1985, DDC launched a new division, Foodservice Research Marketing. In 1986, the company will start MarketScope, a syndicated service based on a major segmentation of the U.S. restaurant population.

Jerry Rosenkranz is chairman of DDC, and Joseph Goldstein is president-chief executive officer. Both are 50 and graduates of the City College of New York.

27 **National Analysts**, Philadelphia. Founded in 1943 and a division of Booz, Allen & Hamilton since 1970. Revenues in 1985 were $9.8 million, up 21.5% from 1984.

National Analysts is a strategically oriented research and consulting company, offering both qualitative and quantitative studies to commercial and not-for-profit clients. Areas of specialization include group and individual depth interviewing,

Marshall Greenberg
National Analysts

market segmentation and trade-off analysis studies and multivariate modeling assignments.

In 1985, NA introduced Mediacaster, a new product forecasting model for health and medical products based on data collected from physicians. Also, NA recently began collecting survey data interactively on microcomputers in central locations. Plans call for expanding this capability to permit rapid turnaround multivariate modeling of data from electronic questionnaires.

A unit specializing in survey work for electric and gas utilities was started in 1985, adding to existing units specializing in pharmaceuticals and medical equipment, telecommunications, automotive, package goods and litigation support.

NA has 46 fulltime, salaried employes and 62 fulltime, non-exempt employes in its Philadelphia and New York offices.

President Marshall G. Greenberg, 50, received his Ph.D. from the University of Michigan.

28 **Mediamark Research Inc.**, New York. Founded in 1979 and 80% owned by MAI PLC. Revenues in 1985 were $9.5 million, up 23.1% from 1984.

MRI operates a syndicated/product research service based on personal interviews with 20,000 adults each year regarding their exposure to advertising media and, via a leave-behind questionnaire, purchase data on a broad line of products and services.

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Top 44 research companies

Clients—agencies, advertisers, magazines, newspapers, broadcasters and cable networks—can gain on-line access to MRI's 25 reports. Also, data are linked to the PRIZM, ACORN and VI-

Timothy Joyce
Mediamark Research

SION geodemographic systems and the VALS psychographic system.

MRI also produces special reports each year based on a two-year database: A business-to-business report, the Upper Deck on the affluent market plus reports related to the top 10 local markets, including data on newspapers and broadcast outlets.

During 1985, MRI set up a custom studies division.

In 1985, MRI acquired NabScan Inc., which provides marketers with sales and price data for UPC-marked items on a weekly basis from a panel of more than 900 scanner-equipped supermarkets. Data are available on a national, regional or local basis.

Revenue growth figures above are calculated on a combined MRI-NabScan base for both years, and together these organizations have 50 fulltime salaried employes in offices in New York, Chicago and San Francisco.

In early 1986, MRI announced the availability of a new microcomputer system called MEMRI (Micro Evaluation by Mediamark Research Inc.), which enables subscribers to process MRI and other databases with the respondent data being held on-site.

Chairman-chief executive officer Timothy Joyce, 52, has a Ph.D. from Cambridge University. President-chief operating officer Alain J. Tessier, 52, has an M.A. from the University of Notre Dame.

29 **Admar Research Co., New York.** Founded in 1960 and since 1985 a wholly owned subsidiary of Sprigg Lane Investment Corp. Revenues in 1985 were $8.9 million, down 4.3% from 1984.

Revenues include those from Market Trends, New York, an

Henry Ostberg
Admar Research Co.

affiliated field and tabulating house with a central WATS facility with 28 lines.

Admar specializes in tracking surveys, product testing and advertising studies employing copyrighted methodologies. Including Market Trends, there are 60 fulltime employes plus about 100 parttimers.

Chairman-chief executive Henry D. Ostberg received his Ph.D. from Ohio State University.

30 **Starch INRA Hooper,** Mamaroneck, N.Y. Public corporation founded in 1923 and traded over the counter. Revenues in 1985 were $8.9 million, up 18.5% from

William Wilson
Starch INRA Hooper

1984.

In 1985 this survey research company acquired its office building on Long Island Sound and completed an extensive renovation.

Revenues for Starch, best known for print ad and print media audience studies, include those of the Roper Organization, New York; the Hooper Telephone Interviewing Service, with more than 30 stations, and participation in the INRA network of affiliated companies in 31 countries.

Starch has 46 salaried, exempt employes and a permanent staff of 160.

During 1985, Starch launched "Public Pulse," a public opinion newsletter, and during 1986 the intent is to expand international activities, including a joint venture with a European research company. Also, Starch, with Herb Krugman, is developing a new tv commercial tracking service.

President-chief executive officer William J. (Jay) Wilson, 43, is a graduate of Yale University.

31 **McCollum/Spielman & Co., Great Neck, N.Y.** Privately held corporation founded in 1968. Revenues in 1985 were $8.8 million, down 6.4% from 1985.

M/S activities are divided into two groups:

Communications Division conducts quantitative/qualitative-effectiveness/diagnostic testing of tv and radio commercials and print advertising utilizing closed-circuit, theater-like interviewing facilities in 12 cities, as well as custom studies in the communications area.

Associates Division includes Child Research Services, which tests children's (and frequently parents') reactions to commer-

Donald McCollum
McCollum/Spielman

cials, programs, packaging products and concepts, and custom studies in the areas of advertising tracking and corporate image.

A good part of the revenue decline from 1984 is because M/S discontinued a large syndicated

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survey called SHAPE.

M/S tv research services, already available in the U.K., Canada and Japan, were introduced in Germany during 1985; further international expansion is planned for 1986.

There are 90 fulltime, salaried employes in four U.S. cities.

Chief executive officer Harold M. Spielman, 59, received his B.S.S. degree from City University of New York. President Donald H. McCollum, 63, received an M.A. from the University of Denver.

Catherine Paura
National Research

32 **Gallup Organization**, Princeton, N.J. Privately held corporation founded in 1935. Revenues in 1985 were $8.6 million, up 11.7% from 1984.

This survey research company is best known because of the syndicated newspaper column the Gallup Poll, which appears in 100 newspapers.

The company also specializes in quantitative studies and public opinion research. About half of this work is custom ad hoc, and the rest comes from syndicated surveys in the areas of financial services, package goods, video products, healthcare, public policy and, most currently, book publishing.

Data are collected through face-to-face interviewing (national sample, 360 primary sampling units, and about 50,000 interviews a year) and a WATS telephone facility with 72 stations in a facility outside Princeton. There are 125 fulltime employes.

George Gallup Jr.
Gallup Organization

Acting co-chairmen are George H. Gallup Jr., 57, a graduate of Princeton University, and Alec M. Gallup, 55, a graduate of the University of Iowa, sons of the company's founder, the late George H. Gallup Sr. Joint chief executive officers are Andrew Kohut, 43, a graduate of Seton Hall University, and Leonard A. Wood, 46, who has an M.B.A. from Rider College.

33 **National Research Group**, Los Angeles. Privately held corporation founded in 1978. Revenues in 1985 were $8.0 million, up 73.1% from 1984.

This survey company, which does almost all its work for the movie industry, specializes in appraising entertainment properties (prescreening to small groups), studies to develop advertising strategy and tracking

revenues come from branches in London and Tokyo. NRG conducts surveys in 12 countries abroad.

NRG has 180 fulltime em-

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Top 44 research companies

ployes and a central 80-station phone facility, of which 60 stations are WATS.

Co-founder Joseph Farrell, 50, is a graduate of Harvard Law School and chairman of NRC. Co-founder and president Catherine A. Paura, 35, has a B.A. from Brooklyn College.

34 **Response Analysis Corp.**, Princeton, N.J. Privately held corporation founded in 1969. Research revenues in 1985 were $7.6 million, up 35% from 1984.

Revenues do not include RAC's ARRO division in Bethesda, Md., which specializes in human factors and performance evaluation/skill testing procedures.

Herbert Abelson
Response Analysis Corp.

This survey research organization, which has 105 fulltime, salaried employes, specializes in commercial research (especially multisponsor and custom studies in financial services and telecommunications), in large-scale survey research projects for government agencies, and, through its Washington division, in studies of job requirements, organizational effectiveness and management for companies and federal and state agencies.

RAC maintains a central telephone interviewing facility with 40 stations, 15 of which are CRT-equipped.

Chief executive officer Herbert I. Abelson, 60, received his Ph.D. from the University of Maryland.

35 **Decision Research Corp.**, Lexington, Mass. Wholly owned subsidiary of Temple, Barker & Sloane founded in 1971. Revenues in 1985 were $6.8 million, up 23.6% from 1984.

This full-service marketing research company specializes in custom ad hoc survey work for consumer goods and business-to-business marketers. In addition, DRC conducts jury simulation work for legal clients, running mock trials during which arguments and appeals are tested. DRC has a 36-station WATS facility.

Robert Duboff
Decision Research Corp.

There are 42 fulltime salaried employes located in two offices, the newer of which is in Palo Alto, Cal.

In January, 1986, DRC acquired Lieber Attitude Research and Lieber/Rebell Associates, two affiliated qualitative research companies in New York.

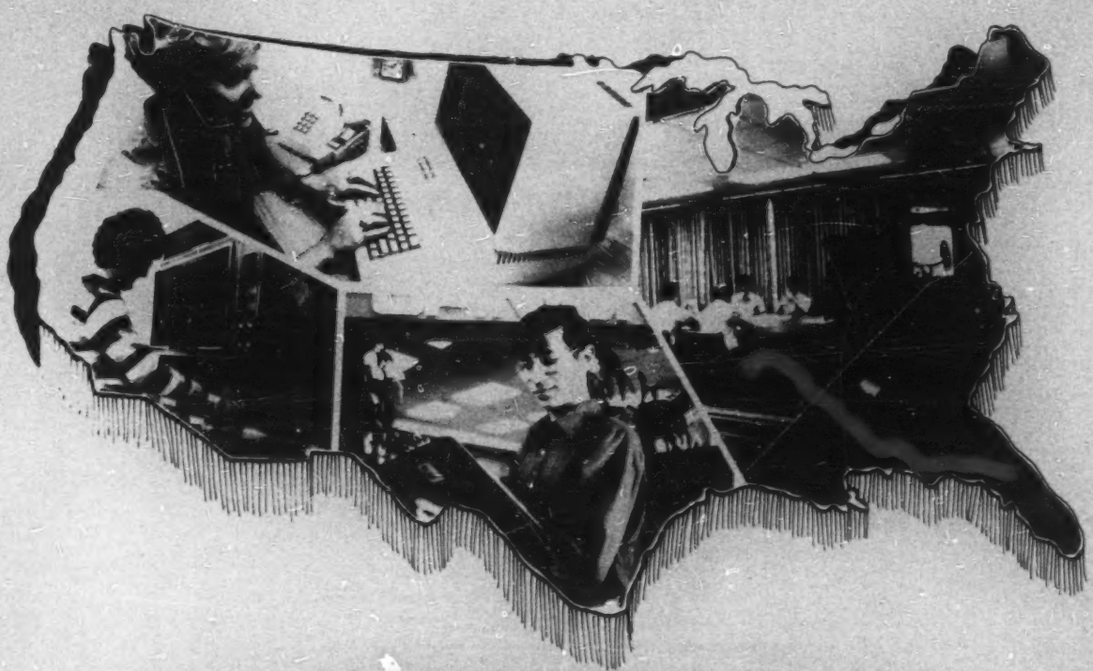
General manager Robert S. Duboff, 37, received his J.D. from Harvard Law School.

36 **Decision/Making/Information**, McLean, Va. Privately held corporation founded in 1969. Revenues in 1985 were $6.7 million, down 14.1% from 1984.

This survey research company, with 60 fulltime employes (34 salaried exempt) and 230 parttimers, is divided into two groups: marketing research and political polling for a range of Republican candidates, including work for the White House and President Reagan. The political volume in 1985 is off from the extraordinary levels of 1984, while commercial work is up.

Richard Wirthlin
D/M/I

In addition to McLean, D/M/I has client service offices in Princeton, N.J., and Santa Ana, Cal. A permanent phone interviewing facility in Provo, Utah, has 100 stations and is expanding its personal-computer-driven inter-



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viewing system from 40 to 60 units in 1986.

Founder-chairman Richard B. Wirthlin, 55, has a Ph.D. from the University of California at Berkeley. He is best known as President Reagan's pollster. Thomas B. Hughes, 41, is president-chief operating officer and has an M.S. from Wichita State University.

37 **Market Opinion Research**, Detroit. Privately held corporation founded in 1941. Research revenues in 1985 were $6.5 million, down 5% from 1984.

Frederick Currier
MOR

About 80% of MOR's revenues are derived from research-related activities. The survey activitics are organized by division: consumer and industrial marketing research; media (especially newspaper) studies; social and public policy research, and political polling.

Because Robert N. Teeter, MOR's president, is prominent as a political pollster/consultant (Vice-President George Bush is a client), a considerable amount of MOR survey work is linked to elections, hence the revenue decline in 1985 from 1984. Nonpolitical work was up at MOR in 1985.

MOR has 80 fulltime employes, 55 of whom are salaried exempt, housed in five offices, one of which is in Toronto. A Washington office was opened in 1985. Three central phone survey facilities include 90 stations, 40 of them CRT-equipped.

Chairman-chief executive officer Frederick P. Currier, 62, received his M.A. from the University of Illinois. President Robert N. Teeter, 47, received his M.A. from Michigan State University.

38 **Guideline Research Corp.**, New York. Privately held corporation founded in 1969. Revenues in 1985 were $6.5 million, up 18% from 1984.

GRC, with more than 50 fulltime, salaried employes in New York and Los Angeles, includes Guideline Research, Topline Research, Guideline-West and Tabline Tabulating Services. The latter two were started in 1985.

GRC specializes in custom market research—concept-product tests, tracking and trade studies, copy research, strategic and image (product and company) studies, trademark litigation, advertising claim substantiation studies, as well as the use of magnitude estimation for product development and optimization.

Norman Passman
Guideline Research

In 1986, GRC will introduce two new services: Extend-A-Line, a procedure for evaluating line extensions, and a new technique for conducting research in low incidence categories.

GRC is jointly headed by Norman Passman, 53, who has an M.B.A. from Long Island University, and Jay Friedland, 46, who has an M.S. from Purdue University.

39 **Ad Factors Marketing Research**, Glen Ellyn, Ill. Privately held corporation founded in 1975. Research-only revenues in 1985 were $5.9 million, down 1% from 1984.

Consumer and industrial surveys are the main business of Ad Factors, which conducts continuous tracking studies, large-scale category profile studies, test-market evaluations, in-home new product testing and

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Top 44 research companies

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In-house facilities include 240 WATS interviewing stations, 110 of which are CRT-equipped, and a data processing system with three VAX 11/350 computers.

John Lett
Ad Factors

Ad Factors employs about 300 people, 48 of whom are fulltime salaried. There are two branch offices. During 1985, the company reorganized into three divisions: Marketing Research, Computer Services and Marketing Services.

Ad Factors founder Donald B. Chapman, 44, a graduate of Portland State University, is chairman-chief executive officer. The president-chief operating officer is John D. Lett, 40, who received his M.B.A. from Bowling Green State University.

40 **J.D. Power & Associates, Westlake Village, Cal.** Privately held corporation founded in 1968. Revenues in 1985 were $5.8 million, up 6% from 1984.

Power & Associates is a full-service marketing information/research company specializing in the domestic and international automotive market. It conducts single-client proprietary research as well as providing multiclient and syndicated research studies.

Related activities include consultancies, a forecast of the car and light truck markets and the Super-Dealer Roundtable, an organization of the top 100 U.S. new-car dealers, which was started in 1985.

Its publication "The Power Report on Automotive Marketing," based on survey data, is widely distributed in the auto industry.

Power & Associates has 36 salaried exempt employes and a total staff of 70.

J. David Power
J.D. Power & Associates

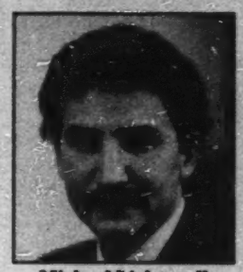
President J. David Power III, 54, received his M.B.A. from the Wharton School, University of Pennsylvania.

41 **Lieberman Research West, Los Angeles.** Privately held corporation founded in 1973. Revenues were $5.3 million in 1985, down 2.6% from 1984.

A full-service, custom research organization with 40 full-time, salaried employes, LRW conducts copy, concept and product testing, tracking and strategic market studies.

LRW specializes in package goods, fast food, healthcare and the entertainment industry.

In the planning stage for 1986 is a new subsidiary specializing in quick turnaround data collection and tabulation, as well as a focus group facility in Los Angeles. Revenues from another LRW stand-alone unit, WATS Interviewing Service of America, are not included in the company numbers above.



Michael Liebergall
Lieberman Research

Chairman Arnold Fishman, 41, is a graduate of Brooklyn College. President Michael Liebergall, 39, studied marketing at New York University.

42 **Marketing Research Services, Cincinnati.** Privately held corporation founded in 1973. Revenues in 1985 were $5.1 million, up 59% from 1984.

The full-service custom research company provides ad hoc and tracking studies for national and international consumer and industrial clients. The company is structured into stand-alone groups that service clients in such industries as computer and software products, commercial and industrial manufacturing, consumer package goods, hospital and healthcare, restaurants, grocery and drug retail, real estate, agricultural chemicals, pharmaceutical products and public utilities.

Edward Horgan
Marketing Research

MRS maintains a 150-station CRT-equipped WATS center, soon to be expanded to 200 stations.

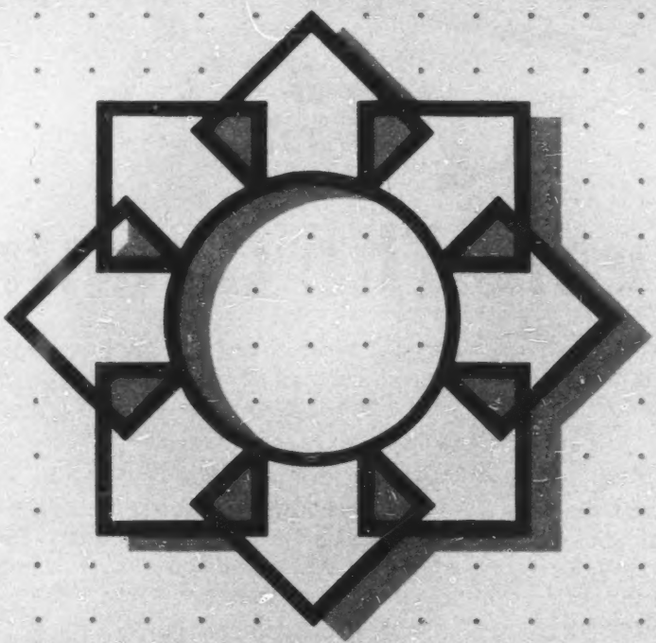
In-house Digital VAX, IBM and Prime computers drive its standard-service software packages, as well as more specialized services offered by the ACCESS on-line, real-time, interactive tab package and Autodial, a computerized sample management system.

MRS employs more than 100 salaried, fulltime personnel (47 exempt) and 190 parttime personnel in the company's recently expanded and renovated 26,000-sq.-ft. headquarters in downtown Cincinnati. MRS opened a high-traffic mall facility in 1985 and plans to expand into more in 1986-87.

Founder Edward D. Horgan, 43, is president-chief executive officer. He attended Xavier University for M.B.A. work.

43 **Oxtoby-Smith, New York.** Privately held corporation founded in 1956. Revenues in 1985 were $5.0 million, up 2.7% from 1984.

CONSISTENCY & COMMITMENT



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This survey research company, which has 65 fulltime, salaried employes, is distinctive in that about 60% of its revenues come from clients for which O-S assumes responsibility for all or almost all of the consumer research functions, filling the roles of both internal department and outside research supplier.

The balance of O-S volume comes from custom ad hoc survey projects, consultation, and research and testimony relating to legal matters, among them

Joseph Smith
Oxtoby-Smith

trademark litigation and advertising claim substantiation.

On-site facilities include a central telephone interviewing facility with 20 stations, all CRT-equipped, and a focus group operation.

President-chief executive officer Joseph Smith, 59, received his Ph.D. from the University of Iowa.

44 Kapuler Marketing Research, Arlington Heights, Ill. Privately held corporation founded in 1974. Revenues in 1985 were $4.8 million, down 19.5% from 1984.

Kapuler's fulltime, salaried staff of 41 offers a broad range of quantitative and qualitative custom marketing research services. The Kapuler Survey Center has 120 WATS stations. WATS and extensive mall activities are supported by tabulating systems. "On-Track" is an interviewing

Stanley Kapuler
Kapuler Marketing

and database management system for continuous WATS tracking.

Qualitative facilities in Chicago and Dallas support Kapuler's UniFocus, one-on-one, in-depth interviewing and analytical system, which is used for advertising and campaign development and diagnostics. The UniFocus system will be expanded in 1986. Kapuler maintains an office in Los Angeles.

President Stanley J. Kapuler, 45, received his M.B.A. from the University of Chicago.

Research people on the move

Research people moving:

Judi Edwards to group manager, Data Development Corp., New York, from associate research manager, Dancer Fitzgerald Sample, New York. Also joining DDC: **Amy Blonder** to group head from group manager, Market Facts, New York, and **Barbara Wacholder** to senior project director, from senior project manager, Stockton & Bortnar, New York.

Harvey Morrow to vp, director of marketing, Information & Analysis, Hicksville, N.Y., from an executive post in the Cable/Video Research Center of Opinion Research Corp., Princeton, N.J.

Claire Hamilton to associate marketing director, NPD/MARKETRAX East Coast sales, from account exec, Dun Jagoda Associates, Syosset, N.Y.

Rick Rinzler to senior project director, Research 100, Princeton, N.J., from senior market research analyst in International Pharmaceutical Products Division of Schering-Plough Corp., Kenilworth, N.J.

John H. Baker to president of Omnifacts Inc., Jenkintown, Pa., new company he founded, from vp-marketing services, the Wellington Group, Haddon Heights, N.J.

Steve McHugh (l.), Ad Factors, and Ruth Peterkin, Total Research Corp., were promoted.

Promotions:

Rupert Burks to senior vp-operations, AGB, Television Research, from vp-development, American Broadcasting Co. He will head the newly established operational headquarters in Columbia, Md. devoted to the development of a national peoplemeter tv audience rating service.

Ruth Peterkin to manager of research projects at the Tampa, Fla., office of Total Research Corp., from a similar position in the company's headquarters in Princeton, N.J.

Jeanette Palagi and **Steven McHugh** to account execs, Ad Factors, Glen Ellyn, Ill., from managers. **Steven L. Dyer** and **Maureen Gorman** to vp, Media Research Group, A.C. Nielsen Co., New York.

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O'Dell's luck, good sense lead to Market Facts

By Richard Edel

Every once in a while fate marks somebody to succeed where others fail. For some, it's almost a charmed life.

One such person is William F. O'Dell, the 77-year-old retired founder and former chairman of Chicago-based Market Facts. From this day almost 40 years ago when Market Facts opened its doors until he left market research in the mid-1960s, saying it is a young man's business, things have gone his way either because of good business sense, personal charm, luck or a combination of the three. His legacy is a company that ranks eighth among U.S. research companies, with 1985 sales of $37.8 million and net income of $1.1 million.

His hair is thinner now, but Mr. O'Dell still has a wry sense of humor and an energetic personality. Involved in business lecturing and writing for the past 20 years, he never dreamed Market Facts would go so far.

"It's just unbelievable that an embryonic idea can turn into such a huge corporation," he says. "And as they're so fond of pointing out around here, I'd have a hell of a time getting a job in the company now."

Given Market Facts' respected place today, it's hard to imagine that its future once dangled on a thread. The time was mid-May, 1946, and office space was virtually unavailable after the war. But Mr. O'Dell had found a 400-sq.-ft. sublet in Chicago's downtown business area, just a few stories up from where streetcars screeched around a corner.

Then all, Mr. O'Dell had just left as a Chicago-based vp for Ross Federal Research Corp., New York, taking three employes with him. The group had total assets of one typewriter, a name and the desire to own a business.

After striking a deal for the space with the building's assistant manager and paying the first month's rent, Mr. O'Dell stepped into the manager's office to pick up the keys. It was there he learned why most business people insist on dealing with the top.

"The manager told me we couldn't have the space because the assistant didn't have the authority to sublet," Mr. O'Dell says. "The two of them were having some kind of personal feud." And the fledgling Market Facts was caught in the middle.

Dejected, Mr. O'Dell trudged to Chicago's Union Station to catch a train to his suburban home. He slumped into a seat, thinking his money and that of five investors was gone.

"It was a sinking feeling. The announcements to prospective clients had been mailed, the telephone connected, our name on the door. We were ready to go."

But fate dealt Mr. O'Dell a trump card. By coincidence, the man sitting next to him on the train was Edward H. Baker Jr., whose law firm represented the estate of the building's owner, salt king J. Sterling Morton.

A stop at Mr. Baker's home and a phone call to his law partner in charge of the building fixed everything. Mr. Baker's partner told Mr. O'Dell to go home and get a good night's sleep. The sublet would be approved.

It was sheer luck, Mr. O'Dell says. "If on a chance basis, I hadn't sat next to that lawyer, Market Facts might never have been." Mr. Baker later became Market Facts' attorney for more than 20 years before his death.

It wasn't the last time that luck—and pluck—played a role in building Market Facts. Landing a big contract with his first client, the StranSteel division of National Steel, Detroit, Mr. O'Dell had to find out quickly whether farmers would buy its ubiquitous war-time product, Quonset huts, as outdoor storage. Borrowing money for field work and going without pay for two months, Mr. O'Dell and assistants were just getting survey forms ready when United Mine Workers chief John L. Lewis called a strike.

Power companies quickly ran out of coal, electric power failed and communications were disrupted. With no lights, Mr. O'Dell's two assistants moved their typewriters next to an outside window in his cramped office to keep up with their work.

The small staff sweated together in a building with no electricity to power fans or the elevator.

But the staff didn't give up even though the odds were heavily against a service business that specialized in custom market research in the 1940s. StranSteel's survey was ready on time and new business was beginning to roll in.

"I never thought of it as a high-risk business because it just had to succeed," Mr. O'Dell says. At least competition was not a factor. For example, A.C. Nielsen Co. was still a young enterprise then.

Once again, however, a lucky break and Mr. O'Dell's determination set the course of Market Facts. An early client, Bob Eggert, research director of the American Meat Institute, happened to change jobs, signing on with the Ford division of Ford Motor Co.

Mr. Eggert, who had worked extensively with Market Facts in the meat institute's successful battle to abolish price controls after the war, now was employed by Ford's whiz kids, who were beginning to use market research in their struggle to catch Chevrolet. Elmo Roper had been doing surveys for Ford until Mr. Eggert became marketing research director.

"Roper lost out because he was dealing with the wrong people," Mr. O'Dell says. Ford quickly became Market Facts' biggest client, accounting for up to 50% of its revenues and much of its growth well into the 1960s.

Despite having the account, the biggest problem in the early days was convincing executives at Ford, for example, that a sample survey could reflect the views of a larger population on such things as auto body styling, pricing and new products, Mr. O'Dell says.

"Ford's management had a hard time believing that you could interview a few thousand people and get a reliable picture of what millions of people would do. They were used to dealing with census data, which is not a sample survey, which made it extremely difficult to sell the idea that you could infer [things] from a small sample," Mr. O'Dell says.

"The fact is that we tried to work with prospective users because there were so few people who knew anything about marketing research."

In doing so, Market Facts developed a reputation for challenging clients' assumptions about the need for research, the optimum size of a project and the potential benefits to be derived from it. This led to Market Facts developing something of a devil's advocate style, which contrasted sharply with the nice-guy, midwestern image of growing Chicago advertising agencies, such as Leo Burnett Co.

Mr. O'Dell is fond of quoting Arthur Simon, formerly of Chicago-based Tatham-Laird & Kudner, who was looking into hiring a research company years ago. "I'll always remember his comment after he had talked to eight or 10 users of research: 'If you want an argument, call on Market Facts.'

"In other words, Market Facts would always challenge the nature of the study and the need for the research. I think we've built on that," Mr. O'Dell says.

It wasn't a situation where other companies were doing bad research, he says. "It was not so much bad as unnecessary, simply because people felt they needed data when they really didn't, or that it was too large a study for what was needed."

Market Facts' growth is a direct result of helping clients optimize allocation of their research dollars, Mr. O'Dell says. This is typified by its early creation of consumer mail panels, which provide accurate data at a cost one-third or less than that of personal interviews.

Today, Market Facts' Consumer Mail Panel is among the nation's largest with 250,000 households, compared with its forerunner, the National Panel with 1,000 households. But it took 10 years to gain acceptance, Mr. O'Dell says.

"It was really a matter of convincing research users that we were in the business to stay."

In addition to mail panels, Market Facts collected data and made reports on studies designed in-house or by clients. Today, however, clients have a wonderland of custom research services to choose from, including focus groups, shopping mall interviews, controlled store testing and telephone consumer opinion forums.

> ***"My advice to people getting into the industry today is to view market research from a management view. In other words, look at the need for the information and how it is to be used."***
>
> **William F. O'Dell**
> **Market Facts founder**

Michael Marcotte

Dave Hardin, the current chairman, started in 1950. Jack Abrams, former chief executive officer who still works parttime, and Verne Churchill, current ceo, started in the late 1950s. (One executive who did leave, Pete Peterson, later became U.S. Secretary of Commerce and was chairman of Lehman Bros. Kuhn & Loeb, New York, before its takeover by American Express.)

Mr. O'Dell also has rewarded hard work. Mr. Hardin, for example, received a chunk of stock one year as a Christmas bonus, Mr. O'Dell says.

"When he came in to thank me, I said, 'Dave, I've always remembered that time when I came into the office at 8:30 a.m. and you had been working all night long and were lying asleep on the davenport in my office.' His response was, 'What a profitable night that turned out to be.'"

Mr. O'Dell holds himself to his own high standards. He points to his waning enthusiasm for the business as the reason behind his decision to step aside as chairman in 1963.

"I was losing my contact with clients, and that's the fun part of the business. So that's when I gave thought to pulling out.

"Market research is a young man's business," meaning it takes stamina and the ability to stay the pace, he says.

So Mr. O'Dell became a lecturer at McIntire School of Commerce, University of Virginia, Charlottesville, Va., until 1975, and since has retired to Fort Myers, Fla.

He has written three books, including one for teen agers, called "How to Get Along with Parents," and has just completed a book called "Competitive Decision Making," which he hopes to publish later this year.

Mr. O'Dell spends much of his time these days just thinking and writing. He has come up with some advice for today's technology-hungry market researchers who he believes are losing sight of the role of the individual.

"Creativity is the one most important ingredient in decision making, bar none," Mr. O'Dell says. "My advice to people getting into the industry today is to view market research from a management view. In other words, look at the need for the information and how it is to be used. Let technology be the last thing you worry about.

"Understanding people is as important as the decision-making process itself."

Executive editor Robert Goldsborough coordinated this Research Business Review.

Coming

Next week Advertising Age's Special Report will focus on New England.

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

May

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Art & antiques —				
American Artist	—	—	—	—
Antiques	—	—	—	—
Art in America	—	—	—	—
Southwest Art	100.7	112.3	365.4	405.5
Total Group	100.7	112.3	365.4	404.5
% change		-10.3%		-9.9%
— Auto/cycle/rec. vehicles —				
AutoWeek (52X)	—	—	—	—
Car & Driver	100.9	116.4	488.5	519.8
Car Collector & Car Classics	16.8	17.1	72.7	94.4
Car Craft	86.9	94.6	358.6	355.6
Circle Track	66.9	68.5	311.6	266.4
Cycle	66.7	68.6	270.5	280.4
Cycle Guide (11X)	75.0	61.4	255.3	222.8
Cycle World	77.8	95.0	292.6	324.4
Dirt Rider	52.2	39.6	236.7	172.2
Dune Buggies & Hot VW's	—	—	—	—
Family Motor Coaching	147.5	148.4	759.1	758.5
4 Wheel & Off-Road	96.5	87.3	427.1	357.8
Four Wheeler	95.8	100.5	419.2	423.5
Hot Rod	74.6	81.5	311.7	311.6
Motorcyclist	65.6	56.0	271.3	205.5
Motor Trend	72.4	80.0	336.3	360.4
Motorhome Life	104.3	96.9	469.5	479.5
Pick-Ups & Minitrucks	—	—	—	—
Rider	84.3	82.1	280.4	306.6
Road & Track	104.6	125.1	487.0	560.1
3 Wheeling	—	—	—	—
Trailer Life	131.4	156.6	589.6	653.0
Total Group	1,520.2	1,494.1	6,627.7	6,661.5
% change		+1.7%		-0.5%
— Boating & yachting —				
Boating	149.1	130.9	793.1	773.4
Chesapeake Bay	40.4	37.8	182.2	157.6
Cruising World	129.7	126.7	646.8	667.2
Lakeland Boating (10X)	82.0	79.0	361.2	354.7
Motor Boating & Sailing	176.9	165.4	1,008.8	946.8
Sail	122.8	129.4	607.6	729.6
Small Boat Journal (6X)	—	—	113.1	103.5
Sport Fishing (6X)	—	—	—	—
Trailer Boats (11X)	57.2	46.1	253.2	203.3
Western Boatman (6X)	38.1	45.2	132.8	148.8
Yachting	148.3	165.2	788.8	913.5
Total Group	944.5	925.7	4,861.6	4,998.4
% change		+2.0%		-2.7%
— Canadian —				
L'Actualite	107.8	90.8	433.6	303.6
Chatelaine:				
English Edition A.	104.1	90.6	487.5	469.5
French Edition	96.5	80.9	424.3	382.6
City & Country Home (8X)	72.0	57.3	200.6	151.4
City Woman	—	—	—	—
Equinox (6X)	39.5	29.7	—	—
Financial Post Money-wise (12X) A.	41.8	38.5	192.4	165.0
Flare A.	123.9	82.0	382.6	323.5
Maclean's (52X) A.	140.0	128.7	673.3	507.1
Montreal Calendar (10X)	28.7	32.7	134.0	162.2
Montreal Ce Mois Ci	48.2	44.0	156.3	186.0
Reader's Digest:				
Canadian-English A.	91.5	89.7	435.4	391.2
Canadian-French A.	90.3	65.5	388.1	299.8
Toronto Life	140.3	94.0	456.5	393.7
Vancouver	—	—	—	—
Total Group	1,094.6	924.4	4,323.6	2,826.6
% change		+18.4%		+53.0%
— Civic/fraternal —				
American Legion	22.3	26.4	126.4	145.2
Elks (10X)	16.8	14.4	96.7	103.6
Kiwanis	17.2	14.9	91.9	74.9
Lion (10X)	3.6	5.5	24.7	24.7
Rotarian	22.8	13.3	78.7	61.0
V.F.W. (11X)	24.2	24.8	137.5	130.3
Total Group	106.6	99.3	514.0	539.7
% change		+7.3%		-4.7%
— Comics —				
DC Comics	5.0	7.0	30.0	34.5
Marvel Comics Group	—	—	—	—
Total Group	5.0	7.0	30.0	34.5
% change		-28.5%		-13.0%
— General —				
American Health (10X)	—	—	—	—
American West (6X)	34.0	26.7	126.8	104.3
The Atlantic A.	34.0	40.7	208.3	248.5
Audubon Magazine (6X)	21.8	51.2	80.7	142.5
Bon Appetit A.	96.0	93.2	418.3	413.3
Changing Times	49.3	38.5	250.2	190.3
Connoisseur	113.8	74.1	353.8	301.5
Consumers Digest (8X)	17.0	16.3	75.0	99.8
Ebony	115.6	112.9	483.1	486.4
Fifty Plus	40.7	24.5	212.3	157.8
Food & Wine	—	—	—	—
Games	—	—	—	—
Gourmet	128.7	94.7	455.6	457.6
Home Entertainment (8X)	—	—	—	—
Harper's A.	30.9	24.2	123.2	122.2
Life	88.0	59.3	282.4	292.7
Modern Maturity (6X)	38.7	48.9	85.6	99.0
Money	150.3	136.7	613.8	593.0
Moneyworth (40X)	—	—	20.5	24.8
Mother Earth News (6X)	—	—	—	—
Mother Jones (10X)	—	—	—	—
National Geographic	29.5	32.1	116.9	112.5
Nature History	43.9	41.1	220.9	231.5
Prevention	62.6	66.8	317.7	304.5
Psychology Today	27.3	24.7	135.2	132.6
Reader's Digest A.	126.3	110.2	512.0	378.5
Saturday Evening Post (9X)	40.6	41.8	150.7	141.1
Signature	77.3	64.3	353.4	285.3
Smithsonian	84.4	87.8	407.2	460.0
Success	—	—	—	—
Sylvia Porter's Personal Finance (6X)	38.8	38.8	178.1	118.3
Town & Country	152.8	159.8	606.9	647.0
Travel-Holiday	38.9	51.7	237.7	353.3
Travel & Leisure	—	—	—	—
Vanity Fair	44.4	36.8	214.7	156.3
Writer's Digest	29.9	33.8	122.0	120.3
Yankee	76.5	69.5	362.6	345.0
Total Group	1,828.1	1,695.3	7,725.4	7,476.7
% change		+7.8%		+3.3%
— Home —				
Americana (6X)	—	—	—	—
Architectural Digest A.	162.2	157.1	598.5	622.3
Better Homes & Gardens	150.1	142.3	564.2	567.5
Colonial Homes (6X)	72.5	79.5	188.8	187.7
Columbus Monthly-Homes (4X)	—	—	52.3	—
Country Home (6X)	49.0	29.5	141.1	96.7
Country Journal	21.3	29.2	128.8	160.4
Country Living	—	—	—	—
Dallas/Ft. Worth Home & Garden	85.4	85.9	411.9	314.0
Family Handyman (10X) A.	69.4	79.7	331.7	323.4
Flower & Garden (6X)	—	—	100.8	92.6
Home	48.9	49.7	251.3	254.8
Home Mechanix	71.0	82.3	355.8	357.6
The Homeowner (10X)	30.9	29.6	141.1	121.1
Horticulture	—	—	—	—
House Beautiful	91.2	86.1	386.9	383.4
House & Garden	133.1	121.8	487.9	495.7
Houston Home/Garden	64.8	107.0	386.3	421.0
Metropolitan Home	76.3	53.5	288.5	327.3
New Shelter (9X)	56.9	55.2	262.7	270.5
1,001 Home Ideas	48.8	74.2	222.2	236.7
Rodale's Organic Gardening	55.5	60.1	344.4	324.2
Phoenix Home/Garden	57.8	58.0	351.3	338.9
Rx Being Well	34.0	30.0	86.0	80.0
San Diego Home/Garden	92.7	105.8	347.4	346.0
South Florida Home/Garden	—	—	—	—
Southern Accents (6X)	112.1	106.0	317.8	273.7
Southern Living	175.0	174.6	738.3	665.3
Sunset Magazine A.	179.5	188.6	728.8	737.8
Texas Homes	—	—	—	—
Workbench (6X)	41.1	58.8	159.8	171.7
Total Group	1,979.5	2,041.5	8,374.6	8,178.3
% change		-3.0%		+2.0%
— In-flight & other passenger —				
Aboard Group (7) (6X)	—	—	—	—
Alaska Airlines	60.4	42.3	268.3	234.0
American Way (25X)	111.5	115.8	566.5	614.8
East/West Network:				
Eastern Review	96.0	95.3	492.8	505.1
Frontier	32.7	27.0	181.0	129.1
Northwest Orient	45.0	35.3	228.8	184.6
Ozark	47.7	35.5	233.3	183.7
PSA Magazine	94.0	77.7	444.5	372.8
Pan Am Clipper	42.8	54.8	237.1	285.3
Republic Scene	55.7	42.5	258.6	220.7
Spirit	91.8	89.3	461.1	434.8
United	87.5	81.3	455.1	437.2
Western's World	64.9	44.7	312.3	267.7
Halsey Publications:				
Air Cal	51.0	33.5	255.8	219.9
Delta Sky	77.2	73.6	379.3	362.8
People's Expressions	—	—	—	—
US Air	47.2	49.0	217.7	241.6
Hawaii (6X)	—	—	—	—
Pace	72.0	80.5	328.9	439.0
Presidential Airways (6X)	8.8	—	20.0	—
Southwest Airlines	—	—	—	—
Spirit of Aloha (6X)	—	—	—	—
TWA Ambassador	61.0	61.2	241.7	240.2
Total Group	1,144.8	1,039.2	5,576.7	5,363.5
% change		+10.2%		+3.9%
— Men's —				
Esquire A.	89.0	111.6	424.0	489.0
Fleshouse Magazine (13X)	30.6	31.5	199.7	200.5
Gentlemen's Quarterly A.	—	—	—	—
M	50.5	58.0	275.0	261.8
Penthouse A.	41.9	38.6	181.4	193.5
Playboy A.	69.9	77.9	313.3	348.8
Total Group	281.9	314.6	1,393.4	1,473.6
% change		-10.3%		-5.4%
— Metropolitan —				
Aloha (6X)	—	—	—	—
Atlanta	69.7	69.0	264.6	266.7
Baltimore	80.6	73.3	370.5	367.3
Boston	175.0	166.6	729.8	733.9
California	98.1	68.5	374.9	327.0
Charlotte (10X)	—	—	—	—
Chicago	141.9	131.8	599.4	611.1
Chicago's North Shore	90.7	80.7	374.9	381.2
Cincinnati	67.6	53.8	305.2	268.0
Cleveland	88.2	71.8	355.1	367.4
Coast (38X)	—	—	—	—
Columbus Monthly	79.7	70.1	322.5	322.5
Connecticut	—	—	—	—
D/Magazine, Dallas/Ft. Worth	—	—	—	—
Denver	42.0	29.3	174.6	141.5
Detroit Monthly	66.7	90.2	405.2	277.5
Grand Rapids	35.0	63.2	211.8	252.2
Gulfshore Life (10X)	—	—	—	—
Honolulu	—	—	—	—
Houston City	62.2	85.9	271.3	364.9
Indianapolis	—	—	—	—
Kansas City	—	—	—	—
Los Angeles	—	—	—	—
Louisiana Life (6X)	—	—	—	—
Madison	65.0	64.0	313.0	299.0
Metropolitan Detroit	105.5	120.0	368.8	361.2
Miami Mensual	50.9	35.1	234.4	187.3
Mid Atlantic Country	44.8	59.5	185.4	234.4
Milwaukee	75.8	76.0	337.4	320.3
Minneapolis/St. Paul	100.5	90.4	471.5	477.6
Nashville	28.0	42.0	185.0	171.0
New England Monthly	54.5	45.5	186.4	147.5
New Jersey Monthly	—	—	—	—
New Mexico	—	—	—	—
Ohio	—	—	—	—
Orlando	90.6	95.8	500.6	505.0
Palm Beach Life	32.5	40.2	396.6	483.4
Palm Springs Life	83.5	92.2	628.1	646.0
Philadelphia	141.7	150.3	624.8	662.6
Phoenix	81.3	94.7	489.3	514.8
Pittsburgh	67.0	60.9	295.3	275.6
San Diego	128.0	178.0	693.2	791.2
San Francisco Focus	102.1	95.5	441.6	419.2
Texas Monthly	130.6	136.8	653.1	559.4
Twin Cities	80.4	66.5	237.0	265.4
Ultra	72.1	84.1	299.7	366.5
Washington (7X)	90.0	44.0	228.0	97.0
Washington Dossier (11X)	45.0	57.6	252.1	285.6
The Washingtonian	190.0	168.0	735.0	760.0
Total Group	2,927.2	2,950.0	13,813.1	13,203.7
% change		-0.7%		+2.3%
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	22.7	23.2	102.4	91.7
Secrets	22.7	23.2	102.4	91.7
True Confessions	22.7	23.2	102.4	91.7
True Experience	22.7	23.2	102.4	91.7
True Love	22.7	23.2	102.4	91.7
True Romance	22.7	23.2	102.4	91.7
Sterling Women's Group:				
Daytime TV	25.8	29.5	125.0	144.5
Modern Screen	—	—	31.0	29.5
Movie Mirror (6X)	—	—	16.5	46.0
Soap Opera Stars	—	—	33.3	39.0
TV Movie Screen (6X)	—	—	16.6	13.0
TV Picture Life (6X)	—	—	9.6	13.0
Total Group	162.0	139.2	846.4	835.2
% change		+16.3%		+1.3%
— Music/entertainment —				
Audio	78.1	83.3	345.7	386.7
Dance Magazine	69.3	76.0	302.3	313.0
Musician	81.2	55.7	278.1	282.0
Playbill	53.0	62.1	222.1	256.1
Stereo Review	72.6	45.2	377.1	190.7
Video	78.1	80.0	366.1	382.0
Total Group	398.3	402.3	1,891.4	1,810.6
% change		-0.9%		+6.4%
— National Sunday magazines —				
Parade (52X)	48.7	52.1	268.5	267.4
Total Group	48.7	52.1	268.5	267.4
% change		-12.2%		+0.4%
— Outdoor & sport —				
Alaska	36.6	50.4	228.1	247.5
The American Handgunner (6X)	36.0	34.0	100.0	102.0
American Hunter	15.2	11.7	85.3	77.1
American Rifleman	19.2	20.7	105.1	115.7
Backpacker (6X)	41.1	43.3	86.0	104.3
Bicycling (9X)	100.2	114.5	367.2	413.7
Duck's Unlimited (6X)	21.7	13.7	80.0	59.7
Field & Stream	118.1	110.3	475.9	475.4
Fins & Feathers A.	67.6	—	240.6	114.3
Fishing World	53.8	46.3	166.5	160.6
Florida Sportsman	111.0	108.2	657.6	608.1
Flying	29.8	53.9	170.2	223.4
Golf Digest	104.6	91.7	509.5	507.6
Golf Magazine	80.5	59.4	435.8	436.1
Golf World (40X)	117.5	97.5	364.8	354.0
Gun Dog (6X)	30.8	28.4	89.2	74.8
Guns	32.8	21.0	143.0	108.0
Guns & Ammo	48.7	45.9	238.7	203.4
In-Fisherman (8X)	107.8	133.5	272.0	298.0

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net, except Los Angeles Times Home Magazine and New York Times Magazine.

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May

	Current month 1986	1985	Year-to-date 1986	1985
Muscle & Fitness	104.6	105.0	538.3	532.0
Outdoor Life	91.7	78.0	428.4	397.7
Outside	47.4	48.1	236.0	226.8
Petersen's Hunting	43.7	42.7	205.8	174.4
The Runner	30.2	38.8	153.2	183.0
Runner's World (13X)	34.2	42.7	160.5	181.9
Salt Water Sportsman	98.6	94.9	585.3	481.6
Shooting Times	32.4	28.8	188.2	148.1
Ski (8X) A	—	—	249.2	215.4
Skiing (7X)	—	—	270.6	203.3
Skin Diver	104.5	93.1	461.8	401.0
Sport	—	—	—	—
Sports Afield	87.7	104.4	409.1	454.1
Tennis	93.9	99.5	349.0	386.8
Waterski (8X)	—	—	—	—
Western Outdoors (10X)	46.4	54.0	272.7	256.9
Wildfowl (6X)	—	—	21.3	—
Windrider (7X)	—	—	—	—
Women's Sports & Fitness	25.8	18.5	104.0	74.3
World Tennis	—	—	—	—
Total Group	**1,979.5**	**1,932.9**	**9,348.9**	**8,999.0**
% change		**+2.4%**		**+3.9%**
— Photography —				
American Photographer	37.2	44.8	182.3	199.3
Petersen's Photographic	28.1	34.9	119.7	136.7
Popular Photography	57.8	94.1	312.2	449.8
Total Group	**123.1**	**173.8**	**614.2**	**785.8**
% change		**-29.1%**		**-21.8%**
— Religious —				
Christian Herald (11X)	25.2	29.0	146.8	158.7
Christian Life	14.5	26.7	106.7	130.9
Christianity Today (18X)	28.8	51.7	249.2	334.8
Inside (4X)	—	—	—	—
Moody Monthly (11X)	42.0	48.5	236.8	270.8
Today's Christian Woman (6X)	41.2	38.7	96.0	128.4
Total Group	**151.7**	**194.6**	**835.5**	**1,023.6**
% change		**-22.0%**		**-18.3%**
— Science/electronic/mechanic —				
Discover	28.9	32.2	158.2	165.0
Family Computing	43.8	24.7	203.9	215.1
Home Mechanix	71.0	82.3	355.8	357.6
Info World (52X)	—	—	—	—
Omni	60.1	50.6	281.0	273.4
Personal Computing	127.0	148.9	554.7	727.2
Popular Mechanics	119.9	127.4	481.9	498.7
Popular Science	70.9	66.7	374.5	329.1
Science Digest	7.2	24.5	61.8	129.4
Science 86 (10X)	18.0	37.7	89.4	136.6
Scientific American	34.7	52.5	165.7	239.1
Spectrum	86.7	118.4	459.7	547.6
Total Group	**668.2**	**765.9**	**3,186.6**	**3,618.5**
% change		**-12.7%**		**-11.9%**
— Women/fashion/service —				
Bride's Magazine (6X) A	—	—	—	—
Cosmopolitan A	—	—	—	—
Essence	95.7	133.3	421.2	435.2
Family Circle (17X) A	197.7	133.1	750.6	747.5
Family Magazine	35.0	35.5	210.2	182.2
Glamour	241.1	195.3	895.2	858.1
Good Housekeeping A	200.5	281.5	805.3	866.0
Harper's Bazaar	116.5	117.1	671.5	698.1
Health	55.4	47.9	209.9	195.5
Ladies' Home Journal	117.2	123.5	564.4	542.2
Mademoiselle	164.5	154.2	627.5	616.6
McCall's	117.9	97.9	468.7	455.9
Military Lifestyle (10X)	45.1	30.8	279.9	158.0
Modern Bride (6X)	230.5	242.0	940.8	934.3
Ms.	58.8	69.8	204.3	259.2
New Woman	78.8	57.9	355.0	260.5
Parents A	98.3	103.5	443.1	450.8
Playgirl	32.4	30.3	186.3	174.7
Redbook	105.5	88.2	466.3	445.2
Self	118.2	92.7	475.7	456.5
Seventeen	110.6	123.1	528.0	582.9
Shape	77.1	60.0	352.3	295.3
Soap Opera Digest (26X)	16.1	48.6	98.3	142.5
Teen Magazine	75.3	71.0	238.2	236.0
True Story A	40.2	57.2	232.9	231.1
Vogue	218.0	219.4	1,251.4	1,298.0
W Magazine	77.3	59.5	539.4	535.3
Weight Watchers	28.5	30.2	169.2	136.5
Woman's Day (16X) A	—	—	—	—
The Workbasket (10X)	26.5	27.2	176.5	190.2
Working Mother	80.9	85.5	342.6	366.5
Working Woman	119.6	98.6	514.4	493.0
Total Group	**2,980.0**	**2,951.1**	**13,503.2**	**13,415.1**
% change		**+0.9%**		**+0.8%**
— Youth —				
Boys' Life	16.9	15.9	81.4	80.9
Campus Life (10X)	22.3	38.6	207.5	249.9
Total Group	**39.2**	**54.5**	**288.9**	**330.8**
% change		**-28.0%**		**-12.6%**

April

	Current month 1986	1985	Year-to-date 1986	1985
— Business —				
Advantage	58.0	89.0	222.0	204.0
Arizona Bus. Gazette (52X)	31.8	23.6	157.9	111.7
Atlanta Bus. Chronicle (52X)	81.4	82.7	294.1	191.3
Austin Business Journal (52X)	40.6	61.9	189.4	214.0
Baltimore Bus. Journal	176.0	176.0	604.0	556.0
Barron's (52X)	202.2	230.9	781.3	778.4
Boston Bus. Journal (52X)	135.7	158.4	545.0	532.6
Business Atlanta	67.5	63.5	226.4	234.3
Business First of Buffalo	—	—	—	—
Business First of Columbus	75.9	85.2	307.5	281.0
Business Journal/Sacramento	37.5	52.5	154.5	144.0
Business North Carolina	49.3	40.2	196.8	163.7
Business Week (52X) A	385.4	408.1	1,202.8	1,378.1
California Business	—	—	—	—
Cincinnati Bus. Courier	60.1	90.0	279.8	231.7
Corporate Report/Kansas City	25.1	45.7	127.4	199.4
Corporate Report/Minnesota	83.1	118.3	314.0	375.0
Crain's Chicago Bus. (52X)	175.3	172.0	612.3	568.0
Crain's Cleveland Bus. (52X)	68.9	86.9	232.7	294.7
Dun's Business Month	42.4	77.4	174.7	202.1
Financial World (24X)	79.9	60.0	214.5	159.6
Florida Trend (13X)	162.1	166.3	370.9	420.5
Forbes (26X)	369.6	422.3	1,001.2	1,167.2
Fortune (26X) A	285.9	486.4	820.2	1,097.8
Frequent Flyer	64.4	71.0	233.0	232.8
Futures (13X)	51.2	49.4	185.2	199.0
Georgia Trend	76.5	—	215.9	—
Grand Rapids Bus. Journal (52X)	34.4	15.5	118.0	30.5
Hawaii Business	51.2	52.9	167.7	173.8
High Technology	18.0	40.8	71.1	135.6
Inc. Magazine A	91.0	119.7	305.0	386.0
Income Opportunities	58.8	49.7	204.4	174.7
Indianapolis Bus. Journal (52X)	156.8	118.0	555.3	459.8
Industry Week (25X) A	90.9	100.1	321.0	349.7
Kansas City Bus. Journal	113.5	149.5	472.2	531.5
Manhattan, inc.	76.6	35.2	257.5	113.8
Milwaukee Bus. Journal	—	—	—	—
Minnesota Bus. Journal	47.8	52.6	177.1	199.3
New England Bus. (20X) A	88.9	95.8	311.0	338.1
Pacific Bus. News (52X)	110.0	116.3	430.0	398.0
Philadelphia Bus. Journal (52X)	129.2	96.5	442.0	361.9
Pittsburgh Bus. Times (52X)	93.0	90.9	342.3	241.9
Regarde's	140.3	121.5	612.8	542.5
San Jose Bus. Journal	81.4	146.7	360.0	448.7
Savvy	35.8	39.3	114.1	143.3
South Florida Bus. Journal	98.8	101.3	429.1	327.3
St. Louis Bus. Journal (52X)	130.9	154.8	524.1	526.4
Texas Business	—	—	—	—
Venture	—	—	—	—
Total Group	**4,532.7**	**4,964.9**	**15,845.2**	**15,839.5**
% change		**-8.7%**		**+.03%**
— National Sunday magazines —				
Parade	60.3	52.9	222.8	215.3
USA Weekend (52X) A	57.5	38.7	220.5	198.7
Total Group	**117.8**	**91.6**	**443.3**	**414.0**
% change		**+28.6%**		**+7.0%**
— Newspaper Sunday magazines* —				
Boston Globe	—	—	—	—
Chicago Tribune	101.8	357.0	130.9	414.5
Cleveland Plain Dealer	72.5	46.0	186.9	165.7
Columbus Dispatch	62.2	50.5	165.8	172.0
Denver Post	180.0	224.0	584.0	612.0
Detroit News	85.0	62.0	324.0	281.0
L.A. Times Magazine	—	—	—	—
Louisville Courier-Journal	55.0	66.5	280.0	264.5
Miami Herald	43.3	34.3	179.8	166.6
New York Times Magazine	310.5	390.4	1,242.5	1,465.0
San Francisco Image	89.2	53.4	260.5	201.0
Seattle Times Pacific	65.0	51.0	198.0	161.0
Toledo Blade Magazine	46.0	36.4	159.4	130.8
Washington Post	120.6	123.4	515.1	429.5
Total Group	**1,241.1**	**1,494.9**	**4,226.9**	**4,463.6**
% change		**-16.9%**		**-5.3%**
— Weeklies/bi-weeklies —				
The Advocate (26X)	176.1	124.1	539.3	379.1
Army Times Military Group:				
Air Force Times (52X)	186.6	195.5	729.7	642.5
Army Times (52X)	169.2	170.9	640.0	573.2
Navy Times (52X)	176.0	175.9	680.7	589.9
The Blood-Horse (52X)	326.7	380.7	1,623.3	1,847.5
Capper's Weekly (26X)	40.6	20.9	126.9	112.8
Commonweal (22X)	4.5	6.4	36.5	29.6
National Journal (50X)	87.7	56.3	227.3	192.7
National Review (25X)	35.1	22.5	121.5	83.0
New Republic (48X)	36.1	36.6	133.5	100.6
New York Magazine (50X)	266.9	255.1	897.7	880.2
New Yorker (52X)	228.4	261.6	776.9	952.9
Newsweek (52X) A	—	—	—	—
People	—	—	—	—
Rolling Stone (25X)	107.3	72.3	387.6	312.8
Sporting News (52X)	63.3	53.1	227.1	143.7
Sports Illustrated (52X) A	250.0	297.0	882.7	872.7
Time (52X) A	223.1	243.8	801.9	848.9
TV Guide (52X) A	231.1	252.1	1,250.4	1,314.0
TV Update (52X) C	2,086.0	2,142.0	9,618.0	9,005.0
Us Magazine (26X)	30.8	28.3	153.8	95.5
U.S. News & World Report	—	—	—	—
Total Group	**4,725.5**	**4,795.1**	**19,854.8**	**18,976.6**
% change		**-1.4%**		**+4.6%**
— Foreign —				
Business Week Int'l (52X)	163.5	145.2	451.1	441.7
Cosmopolitan Foreign Editions:				
Australia	69.1	55.8	224.5	187.6
Brazil	55.7	42.4	198.3	118.0
France	140.2	139.8	254.7	364.8
Germany	152.8	140.4	370.5	355.2
Great Britain	134.0	147.0	348.5	372.0
Greece	40.0	76.0	135.0	279.3
Holland	80.0	84.0	201.0	268.3
Italy	103.3	93.0	265.8	198.6
Japan	51.3	37.3	213.3	114.3
Cosmopolitan en Espanol:				
Central America	1.0	0.3	7.7	2.7
Colombia	4.0	11.0	21.0	24.3
Mexico	40.0	53.7	85.9	121.3
Peru	—	5.0	—	7.0
Puerto Rico	13.0	26.8	27.7	78.8
U.S. (Spanish language)	17.7	12.3	79.8	69.5
Venezuela	7.0	31.8	38.7	71.2
Good Housekeeping Foreign Editions:				
Australia	22.0	24.7	100.7	117.7
Great Britain	149.8	145.9	—	376.1
Japan	71.6	66.5	—	257.0
Buenhogar:				
Central America	—	—	2.0	3.0
Chile	1.0	—	4.0	5.0
Colombia	30.0	32.0	84.3	91.0
Ecuador	8.0	10.0	33.0	39.0
Mexico	40.3	47.7	88.3	127.2
Peru	4.0	9.0	13.0	24.5
Puerto Rico	9.5	5.5	31.5	25.0
Venezuela	30.7	30.5	78.7	84.0
Geomundo:				
Central America	6.0	8.0	13.0	20.5
Chile	6.0	9.0	13.0	21.5
Colombia	11.0	8.0	27.3	28.5
Ecuador	4.0	8.0	10.0	15.0
Mexico	4.0	8.0	16.5	24.0
Peru	5.0	8.0	10.0	22.5
Puerto Rico	3.0	3.0	6.0	17.0
Venezuela	10.0	10.0	36.0	36.0
Hombre De Mundo:				
Central America	2.0	3.0	19.0	14.0
Chile	2.0	5.0	16.0	16.0
Ecuador	3.0	5.0	15.0	16.0
Mexico	7.0	9.0	22.0	28.0
Peru	2.0	4.0	11.0	12.0
Puerto Rico	3.0	6.0	13.0	15.0
Venezuela	15.0	15.0	50.0	47.0
Ideas Para Su Hogar:				
Colombia	4.0	12.0	24.7	32.0
Ecuador	2.0	4.0	6.0	14.0
Mexico	6.0	6.7	9.0	17.5
Peru	1.0	3.5	4.0	8.0
Puerto Rico	—	—	—	3.0
Venezuela	7.8	14.0	28.3	46.5
Mecanica Popular:				
Argentina	3.7	4.2	10.7	13.7
Central America	10.0	9.7	35.3	42.3
Chile	6.0	2.3	20.3	16.5
Colombia	16.5	10.7	57.7	44.7
Mexico	10.0	10.3	33.7	41.3
Peru	11.5	13.0	36.3	50.7
Puerto Rico	6.5	9.0	26.8	44.5
Venezuela	10.5	10.2	36.8	46.7
Vanidades Continental:				
Central America	21.7	8.8	43.2	29.0
Chile	7.3	2.3	14.3	10.3
Colombia	106.0	122.0	191.2	225.3
Ecuador	29.5	40.0	14.3	10.3
Mexico	113.0	135.5	211.2	253.3
Peru	18.0	23.3	33.3	48.3
Puerto Rico	57.2	65.0	114.8	143.5
U.S.	48.8	50.5	150.8	144.5
Venezuela	42.8	78.8	118.0	174.7
International Communications:				
African Business	24.8	41.3	102.3	92.6
New African	27.2	10.2	73.0	62.1
The Middle East	10.3	24.8	37.4	68.9
International Management:				
Europe	—	—	—	—
Middle East	—	—	—	—
Johnston International:				
Alam Attijarat	35.2	43.3	130.8	182.3
Modern Africa (6X)	15.8	11.3	29.1	23.7
Modern Asia (11X)	46.0	29.7	117.0	103.3
Newsweek International A:				
Atlantic (52X)	—	—	—	—
Latin America (52X)	—	—	—	—
Pacific (52X)	—	—	—	—
Progreso (9X)	15.0	11.0	27.2	35.6
Reader's Digest:				
Arabic	6.0	8.5	18.5	38.5
Asian	131.5	157.0	868.3	652.0
Australian	67.8	48.3	223.4	203.1
Belgian-Flemish	85.3	107.5	239.3	286.0
Belgian-French	48.3	70.0	152.8	203.5
British	32.5	48.1	157.0	166.8
Chinese &	81.0	118.5	371.5	426.5
Danish	22.7	38.8	101.7	127.4
Dutch	48.0	64.3	121.1	172.3
Finnish	68.5	76.5	116.5	158.3
French	15.0	44.3	61.0	177.4
German	83.3	88.8	262.8	273.9
Iberian	1.5	5.0	2.0	28.5
Indian-English	98.0	80.0	365.0	385.5
Indian-Hindi	10.5	5.0	45.0	34.5
Italian	44.0	59.0	138.0	122.5
Korean	29.3	25.0	106.4	95.5
Latin American:				
Argentina	15.0	23.0	40.5	75.0
Brazil	—	5.0	14.0	15.0
Central America	10.0	8.5	23.0	31.5
Chile	8.0	2.5	36.5	30.0
Colombia	3.0	31.0	45.0	90.0
Ecuador	9.0	8.5	23.0	29.5
Mexico	61.9	59.5	161.7	130.1
Peru	9.0	11.5	28.0	37.5
Puerto Rico	6.5	6.0	19.5	20.0
U.P.B.	7.0	11.0	21.0	29.0
U.S. Spanish	64.0	5.0	80.0	29.5
Venezuela	16.5	26.5	32.5	46.0
New Zealand	31.0	46.5	201.0	177.0
Norwegian	8.5	35.5	25.0	79.5
South African	56.5	82.0	255.0	317.0
Swedish	13.0	14.0	55.0	70.5
Swiss-French	22.0	38.0	86.0	97.6
Swiss-German	29.0	40.0	116.0	136.1
Time International:				
Time-Asia	90.3	91.8	255.9	289.1
Time-Atlantic	121.5	125.7	347.9	358.3
Time-Canada	217.0	203.8	702.6	643.7
Time-Latin America	42.7	45.7	164.4	125.3
Time-South Pacific	62.7	110.3	268.5	393.8
Vea (52X)	163.3	135.0	554.8	445.4
Visa/Latin America (26X) A	24.0	29.8	79.2	80.1
Total Group	**4,197.2**	**4,629.7**	**12,360.8**	**24,067.3**
% change		**-9.3%**		**-48.8%**

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